

2012 ANA Advertising Financial Management Conference

presented by **ACTIVE**
INTERNATIONAL®

May 6–9, 2012 | Boca Raton, FL



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presented by Active International

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Agenda

2012 ANA Advertising Financial Management Conference

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Overview

2012 ANA ADVERTISING FINANCIAL MANAGEMENT CONFERENCE PRESENTED BY ACTIVE INTERNATIONAL

The annual ANA Advertising Financial Management Conference is the only event of its kind. It brings together top marketing finance and procurement professionals from the client side with agency CFOs and other key industry stakeholders interested in efficiencies, cost savings, return on investment, and delivering greater value to organizations. The conference is registered as a sponsor of continuing education with both the Institute for Supply Management and the National Association of State Boards of Accountancy.

2012 Conference Program Chair:

Sopan Shah

Group Manager, Marketing Procurement

Nestlé USA

Agenda

SUNDAY, MAY 6, 2012

Session (4:00 pm)

HOW DO THE MOST ADVANCED MARKETING PROCUREMENT ORGANIZATIONS SET THEMSELVES UP FOR GLOBAL SUCCESS?

WFA (World Federation of Advertisers) will offer up research, case studies and member input from its global sourcing network on how international supply chains and the rising importance of the BRIIC markets are changing the ways in which marketing procurement is organized. This session will also feature hot-off-the-press research that benchmarks the “Marketing Procurement Maturity” of the biggest advertisers worldwide and how they stack up against best-in-class global sourcing teams.

Steve Lightfoot

Global Communications Procurement Manager

World Federation of Advertisers

Paul Duxbury

Co-Founder and Director

SPIRE Worldwide

Pre-Reception (6:30 pm)

sponsored by Mediaocean

Opening Dinner (7:30 pm)

sponsored by Reed Smith

MONDAY, MAY 7, 2012

Breakfast (7:30 am)

sponsored by Decideware

Steven Wales

Business Director

Decideware Inc.

General Session (8:30 am)

OPENING REMARKS

Barbara Martino

Executive Vice President, Client Development

Active International

WELCOME REMARKS

Bob Liodice

President and Chief Executive Officer

ANA

Agenda Cont.

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OPENING ECONOMIC KEYNOTE

Leaders from PwC and Eurasia Group (a global political risk research and consulting firm) will provide a kickoff briefing on the economic and geopolitical trends and insights that can be used in upcoming business planning, strategy, and execution. PwC will tap into its widely followed Entertainment & Media Outlook 2011-2015 to provide a glimpse of how numerous facets of the media industry (advertising, television, digital, and filmed entertainment) are intended to fare in various markets. The Eurasia Group will provide political and economic context in those same markets, examining cross-border issues such as trade, energy and other commodities, financial regulation, climate change, and global health. Rounding out the briefing will be a readout of how most CEOs around the world are targeting growth, based upon PwC's recent 15th Annual CEO Survey, released in January on the eve of the World Economic Forum Annual Meeting in Davos.

John Swadener

Director, Marketing Transformation Practice

PricewaterhouseCoopers, LLP

Larry Cristini

Associate Director, Corporate Advisory Services

Eurasia Group

Q&A Session

Sopan Shah

Group Manager, Marketing Procurement

Nestlé USA

CPO KEYNOTE

Hans Melotte is vice president and chief procurement officer at Johnson & Johnson and will deliver the first-ever CPO keynote in the history of this conference. This session will cover the CPO perspective on the role and function of procurement overall including alignment to the business and talent management. This overall procurement viewpoint will be followed with insight on the role/importance of marketing procurement within the total procurement org; how procurement at J&J works to build relationships internally with marketers and externally with agencies; how to move the perception that procurement is about "cutting costs" to one that is "building value"; and more.

Hans Melotte

Vice President and Chief Procurement Officer

Johnson & Johnson

Q&A Session

Michael E. Thyen

Director, Marketing and Sales Global Procurement

Eli Lilly and Company

CMO PERSPECTIVE

Cleveland Clinic is a nonprofit, multispecialty academic medical center and one of the largest and most respected hospitals in the nation, attracting patients from all 50 states and more than 70 countries. Paul Matsen, chief marketing and communications officer of Cleveland Clinic, has been called a "CMO you should know" by Advertising Age. Paul will share perspective on various issues including what CMOs are expecting from their marketing budgets, using data to drive strategic marketing decisions, customization of messaging, and more.

Paul Matsen

Chief Marketing and Communications Officer

Cleveland Clinic

Q&A Session

Bill Duggan

Group Executive Vice President

ANA



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SIR MARTIN SORRELL

Sir Martin Sorrell last spoke at the ANA Advertising Financial Management Conference in 2002 and a lot has changed in ten years. He'll address issues including current tension points in client/agency relations, future growth opportunities for holding companies, how the industry is innovating, and more.

Sir Martin Sorrell
Chief Executive Officer
WPP

Q&A Session

Bob Liodice
President and Chief Executive Officer
ANA

Lunch (12:45 pm)

sponsored by Active International

Bill Georges
President, Sales and Operations
Active International

General Session cont. (2:15 pm)

DIGITAL DOOM OR BOOM?

The juggernaut of digital marketing seems unstoppable. Yet the risks on the Internet are growing just as fast, creating a very dangerous imbalance between the rush to ROI and potentially ruinous costs when things go wrong — the Cloud, IPv6, ICANN, trolls, hackers, phishers, squatters, spiders, and worms. Sounds like a scene from *The Wizard of Oz* except that the Wicked Witch may be winning. Douglas Wood, ANA's general counsel and partner with Reed Smith, will put the risks in perspective and suggest ways to address them without putting the brakes on creative ideas in cyberspace.

Douglas J. Wood
Partner
Reed Smith LLP

Q&A Session

Jim Zambito
Senior Director, Agency Management/Finance
Johnson & Johnson Global Marketing Group

ACCOUNTABLE COMPENSATION

Jockey selected its new agency partner based on one simple premise: accountability. Accountable compensation changes the client/agency dynamic because an agency earns its profits through its contributions versus having them guaranteed. In Jockey's case, its agency, TPN, is incentivized to work more efficiently because they are paid on creative output (projects on the SOW) and not hours. It is about efficiency AND effectiveness. All agency profits are contingent on meeting thresholds and both the agency and client share in Jockey's successes and failures. This form of compensation is not without its critics, but Jockey believes it's the future for those clients wanting more accountability and a better agency relationship.

Dustin Cohn
Chief Marketing Officer
Jockey International

Rich Feitler
President
TPN

Q&A Session

Sopan Shah
Group Manager, Marketing Procurement
Nestlé USA

Agenda Cont.

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MEMBERS ONLY ROUNDTABLE

We'll close the day with a discussion open to ANA members only. Two topics are scheduled – global agency management and talent development for marketing procurement. Meanwhile, impromptu topics for discussion will also be encouraged. This is a great opportunity to share your perspective and learn from your peers at other companies.

Facilitators:

Ron Jensen

Director of Financial Synergies

Toyota Motor Sales U.S.A.

Michael E. Thyen

Director, Marketing and Sales Global Procurement

Eli Lilly and Company

Adjournment —

Dinner on Own (5:00 pm)

TUESDAY, MAY 8, 2012

Breakfast (7:30 am)

General Session (8:30 am)

A WALL STREET PERSPECTIVE

A leading Wall Street equity research analyst will provide perspective on the agency landscape as seen through the eyes of investors, including the state of the advertising and media sectors overall, strengths/weaknesses of the various players, and trends to watch going forward. After starting his career as an investment banker and equity research analyst at Lehman Brothers and Deutsche Bank, then spending seven years in the agency business as global director of forecasting for Interpublic's Magna Global, Brian Wieser returned to Wall Street as an equity research analyst. Brian currently covers IPG, Omnicom, WPP, Google, Yahoo and Facebook. He also focuses on other ad-supported media companies and issues across various sub-sectors.

Brian Wieser

Senior Analyst

Pivotal Research

Q&A Session

Ron Jensen

Director of Financial Synergies

Toyota Motor Sales U.S.A.

AGENCY TRADING DESKS — THREAT OR OPPORTUNITY?

All the major agency holding companies as well as some independents have set up “agency trading desks” to purchase display and other types of advertising. These trading desks essentially cut out ad networks as intermediaries between clients/agencies and publishers. They are a new business for agencies and, in theory, clients benefit as the agency margins are lower than the ad networks. In addition to lower costs, benefits to clients include better targeting and richer insights. However, trading desks have raised concerns around lack of transparency, conflicts of interest, double paying, and more. This panel will explore the threats and opportunities of agency trading desks. (Also, see the ANA white paper titled, “Agency Trading Desks: Basics Marketers Need to Know & Questions to Ask.”)

Moderator:

Bill Duggan

Group Executive Vice President

ANA

Panelists:

Brian Lesser

Chief Executive Officer

Xaxis

Brendan Moorcroft

Chief Executive Officer

Mediabrand Audience Platform

Joanna O'Connell

Senior Analyst

Forrester Research



Agenda

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AD-ID — JOIN THE REVOLUTION

Ad-ID is the barcode that is revolutionizing the advertising world. The current system of advertising asset identification is too slow, too labor intensive, and too inefficient. Each ad asset has hundreds of names, codes and other descriptors that are used throughout its lifespan. Ad-ID is a universal code that is fast, smart, and accurate. It is critical to finance and procurement as well as other stakeholders including the media, the measurement industry, and talent administrators.

Gary Lee

President, **Ad Money**
Consultant, **Ad-ID**

10 THINGS YOU SHOULD KNOW ABOUT DIGITAL, SOCIAL, & MOBILE

Today people live their lives with a digital device in hand. Mobile phones, tablets, and laptops allow people to search, share, and even shop no matter where they are - and that can pose great opportunities and challenges for brands. In this session you'll learn about cutting edge digital marketing trends like Responsive Experience Design, Dynamic Media, and Everywhere Commerce and how they are impacting consumer experiences. See how brands are successfully navigating this new landscape and discover ways you can make digital, social, and mobile marketing work for your brand.

Kelly Mooney

Chief Executive Officer

Resource Interactive

Q&A Session

Sopan Shah

Group Manager, Marketing Procurement

Nestlé USA

INSIGHTS FROM ADVERTISERS WHO HAVE EMBRACED MEDIA AUDITS

The field of media auditing continues to be under developed in the United States and misunderstood by many marketers. There are various types of media audits and each involves a wide variety of approaches, results and benefits offered. This panel will provide insights from three advertisers who have successfully conducted media audits. The discussion will focus on why media audits were initiated, how organizational challenges were addressed, and the value received from the outputs. In addition, results will be shared from a new survey from the Media Audit Council that provides a solid understanding of the challenges and success factors advertisers have experienced in bringing the practice of media auditing into their organizations.

Opening Comments:

Jim Garrity

President, **Media Audit Council**

Moderator:

Mark Kaline

Global Director, Media, Licensing and Consumer Services

Kimberly-Clark Corporation

Panelists:

George Giassopoulos

Director, Global Marketing and Media Agencies

Global Procurement and Operations

Pfizer Inc.

Tom Lagan

Director of Marketing Services Procurement

Bayer HealthCare U.S.

Nicholas Kline

Sr. Mgr., Service & Support Purchasing, Renault Nissan

Purchasing Organization, Regional Supplier Acct. Mgr., Americas

Nissan North America, Inc.

Agenda Cont.

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Lunch (12:45 pm)

Breakout Sessions (2:00 pm)

Part 1: 2:00-2:55pm

1a. THE FUTURE OF DIGITAL MEDIA BUYING

Digital media buying technology and operations are undergoing a dramatic transformation. Marketers are replacing traditional relationship marketing tactics and opaque ad networks with programmatic media buying that includes transparent ad exchanges and audience targeting. These new options give interactive marketing professionals what they crave - better targeting, less waste, more efficiency, and better results. However, marketers who don't take an active role in managing this new form of media buying will pay the price, either by dealing with inefficient buyers reluctant to abandon the old model or by ceding control to a demand-side platform (DSP) or central trading desk without entirely understanding its methodologies.

Joanna O'Connell
Senior Analyst
Forrester Research

1b. UNDERSTANDING HOW CORPORATE TRADE CAN HELP ACHIEVE YOUR GOALS

Procurement and finance executives are increasingly tasked with driving greater efficiencies and cost savings in their operations. With the pressure and complexity of today's business environment, utilizing standard cost cutting or efficiency techniques to drive more meaningful results is simply not enough. Corporate trade is an option that can help you meet the challenges in front of you. In this session, you are invited to "look under the hood" and learn more about how trade works. We'll also show how trade can be used in ways you might not have realized - such as maximizing production capabilities, exiting sponsorships, extending a budget or generating immediate cash flow. Finally, we'll share some real life examples of companies who have gone through the process of integrating trade into their business and how they benefited. **Please note: this session is closed to competitive barter/corporate trade companies.**

Bill Georges
President, Sales and Operations
Active International

Kevin Farkas
Executive Vice President, Sales and Business Development
Active International

Part 2: 3:00-3:55pm

2a. STATE COMMERCIAL PRODUCTION INCENTIVES

Many states now offer production incentives for advertisers willing to shoot their commercials in that state. These incentives are offered by the states to create jobs and attract investment. Almost the entire film and television industry takes advantage of these incentives and many large advertisers are now participating as well. These savings can be achieved without sacrificing quality and the savings can be quite attractive — they usually range from 15% to 30% of production costs. This session will cover what these incentives are, how they vary by state, why advertisers should participate, how to apply for and receive these rebates, and the most effective way to realize the savings to add to your bottom line. Also, we'll discuss the perspective from some in the production community that production incentives belong to the production house or even the agency, rather than the advertiser.

John Lick
Executive Producer, Broadcast, **Target**
Co-Chair, **ANA Production Management Committee**

Valerie Light
Sourcing Process Leader, Broadcast Production Manager for Television and Radio, **Verizon Communications**
Co-Chair, **ANA Production Management Committee**

Mike Rose
Chief Executive Officer
Ease Commercial Services

Shelley Landgraf
Owner/Founder
The Landgraf Consulting Group



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2b. STREAMLINING DIGITAL ADVERTISING

The Bank of Montreal, one of the leading banks in Canada and in the U.S. embarked on a major initiative to streamline digital advertising. That work had been extremely fragmented, resulting in high costs and inconsistent branding. In this session, SapientNitro, The Bank of Montreal's agency partner will share how they were able to create enterprise synergies across the firm resulting in reduced costs and improved branding.

Joey Wilson

Vice President, Finance & Marketing Strategy

SapientNitro

Pre-Reception (7:00 pm)

sponsored by TAG Worldwide

Dinner (8:00 pm)

WEDNESDAY, MAY 9, 2012

Breakfast (7:30 am)

General Session (8:30 am)

INSIGHTS FROM IBM'S C-SUITE GLOBAL STUDIES OF CMOs AND CFOs

IBM has conducted a series of C-suite global studies encompassing interviews with more than 15,000 top executives over the past seven years. The two most recent studies have been with CMOs and CFOs.

- CMOs are feeling stretched, but also have great excitement about the future of marketing. For CMOs the pressure to be accountable to the business is not just a symptom of hard times, but a permanent shift that requires new approaches, tools, and skills.
- Meanwhile, the demands on CFOs are also rising and extend well beyond traditional financial control and supervision. A group that consistently outperforms their peers drives a combination of two key capabilities - financial efficiency and business insight - across their organizations.

These studies cast light on the challenges public and private sector CMOs confront and the opportunities they envision in increasingly complex times.

Ron Kline

Director of Marketing, Midmarket and Business Partners Organization

IBM Corporation

Q&A Session

Sopan Shah

Group Manager, Marketing Procurement

Nestlé USA

GLOBAL PERSPECTIVE ON MANAGING MARKETING SERVICES

A leading global marketing expert will discuss the challenges and opportunities of managing marketing services on a global basis. The session will cover important issues including agency structures, the benefit of common process and measurement, as well as the fundamental differences in how various disciplines operate internationally — including media, production, and market research.

Alan Rutherford

Founding Partner

Axiology

(and International Advertising Association Chairman & World President)

Agenda Cont.

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GLOBAL AGENCY COMPENSATION TRENDS & PRACTICES

A new ANA survey identifies how marketers structure and manage their global agency compensation, including performance based incentives. The work illustrates the key trends in global agency remuneration methods and practices as well as differences and similarities compared with the United States.

David Beals

President and Chief Executive Officer

R3:JLB

Greg Paull

Principal

R3:JLB

Q&A Session

Jim Zambito

Senior Director, Agency Management/Finance

Johnson & Johnson Global Marketing Group

INCENTIVE COMPENSATION

Also called “pay for performance” or “performance incentives” this is a method where some, or all, of the agency’s compensation is tied to the achievement of performance results mutually agreed by the client and the agency. When done well, performance incentives align agency and client on business/communications agendas and goals and the discussion shifts from just hours/FTE’s/costs to meeting performance objectives. 46% of marketers use incentives with at least one of their agencies (per ANA survey results). This will be an open discussion to get perspective from all conference attendees — clients, agencies, consultants — on what’s working and what could work even better with incentive compensation.

Facilitators:

Sopan Shah

Group Manager, Marketing Procurement

Nestlé USA

Jim Zambito

Senior Director, Agency Management/Finance

Johnson & Johnson Global Marketing Group

Adjournment (12:00 pm)



Registration List

2012 ANA Advertising Financial Management Conference presented by Active International

Andrew Acampora
Chief Operating Officer
and Chief Financial Officer
SS+K

Thomas Adams
Director, SQUAD WebCosts
SQUAD, Inc.

Tyler Adams
Consultant
Kellogg Company

Matthew Agronin
Associate Director - Advertising
Verizon Wireless Inc.

Tony Aiello
General Manager
APR Consulting Co.

Jim Akers
Senior Director, WW Procurement
& Global Operations Global Lead, Mktg
& Sales Sourcing
Pfizer Inc

Svetlana Alekperova
Sourcing Manager
Millennium Pharmaceuticals, Inc.

Tammy Alvino-Przybylski
Client Finance Director
JWT

Mark Amone
Finance Director
Porter Novelli

John Anagnost
Vice President, Sales
and Agency Partnerships
X+1

Craig Andrews
Senior Manager, Strategic Sourcing
& Procurement
AFLAC, Inc.

Vanessa Andrews
Vice President, Global Client Operations
WPP

Bradley Apelgren
Finance Director
TBWA Worldwide

Mitch Arends
Director, Marketing Services Procurement
Kraft Foods, Inc.

Denise Arevalo
Senior Category Manager -
Marketing Procurement
Office Depot

Rod Armbruster
Senior Partner, Director of Finance
JWT Atlanta

John Arnholt
Senior Vice President
Zubi Advertising

Phil Asche
Senior Partner
Relationship Audits & Management

Gary Attilio
Senior Vice President,
Regional Finance Director
**Publicis Healthcare
Communications Group**

Tracy Avelar
Vice President, Strategic Sourcing
BlackRock, Inc.

Paul Ayestas
Client Finance Manager
Ogilvy & Mather

Joy Baer
Executive Vice President/
Chief Operating Officer
STRATA

Laura Bajkowski
President
Bajkowski & Partners LLC

Tim Bajraktari
Partner
Beekman Associates

Yvette Baldin
Head of Marketing
and Product Development
Freedman International

Jim Baller
Executive Vice President,
Global Partner, Operations
Universal McCann

Chris Baranowski
Vice President, Finance
MARS Advertising, Inc.

Kyle Barich
President of CMD NY Account Services
Cline, Davis, & Mann, Inc.

Tim Barlog
Vice President, Director
Digitas Inc.

Peter Bates
Senior Vice President, Client Services
Hogarth Worldwide Inc

Brice Bay
Chief Executive Officer
Enveritas Group

David Beals
President and Chief Executive Officer
R3:JLB

Jim Bean
Principal
**AARM | Advertising Audit & Risk
Management Address**

Michael Beardsley
Global Procurement Manager
Colgate-Palmolive Company

Jill Beasley
Client Finance Director
MindShare N.A.

Ken Beaulieu
Director, Marketing & Communications
ANA

Ken Begasse
Chief Executive Officer
Concentric Pharma Advertising

Ali Belgaumi
Chief Financial Officer
Publicis

Rick Bennington
Senior Vice President, Director
of Operations
Leo Burnett Worldwide

Richard Benyon
Chief Executive Officer
Decideware, Inc.

Keith Berard
Senior Vice President, Regional Director
of Client Finance
JWT

Ed Berg
Director, Member Relations
ANA

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John Bergman
Procurement Manager, M/C
Apple Inc.

David Berney
Chief Executive Officer, Americas East
**Mundocom | Publicis Groupe
Production Platforms**

Robert Bernstein
Vice President, Indirect Procurement -
Americas
Bacardi U.S.A., Inc.

Reva Bhatia
Procurement Specialist
BP Oil

Anna Binninger
Finance Director
Saatchi & Saatchi

Pat Birmingham
Director, Global Customer Marketing
Pfizer Inc

Jane Bittner
Director, Global Procurement
Merck & Co.

Steve Blamer
Managing Partner
Blamer Partnership

Tess Blankenship
Senior Manager
Amgen Inc.

Sara Bodison
Global Director, Marketing Procurement
Reed Elsevier

David Bonthron
Executive Vice President, Global Business
Development
GroupFMG

Jeff Boose
Chief Financial Officer
inVentiv Communications

Catharine Borzon
Chief Financial Officer-Neo@ogilvy
Ogilvy & Mather

Terri Bowers
Senior Procurement Manager
Microsoft Corporation

Joel Boysen
Director Supply Chain Management
Leo Burnett

Ken Breen
Director, Agency Relations
Mediaocean

Heather Brehm
Vice President, Business Development
Enveritas Group

Beth Brenner
Marketing Procurement
Kellogg Company

Mike Brewster
Marketing Director, Global Retail
and Consumer
PricewaterhouseCoopers

Justin Brocato
Manager, Marketing Operations/Global
Corporate Marketing & Branding
Cisco Systems, Inc.

Stephen Broderick
Partner
Firm Decisions ASJP

John Broe
Vice President/Senior Director
of Partnership Development
Crispin Porter + Bogusky

Rick Brook
Senior Vice President, Global Client
Operations, New York
WPP Group Plc

David Brown
Executive Vice President, General
Manager, Meredith Integrated Marketing
Meredith Corporation

Howard C. Brown
Vice President & General Manager
**Lopez Negrete
Communications, Inc.**

Kathryn Browne
Chief Financial Officer
Quigley-Simpson

Leana Budico
Financial Operations Manager
Sid Lee Inc.

Maria Bugenhagen
Manager, Strategic Sourcing
CenturyLink

Alicia Burke
Global Marketing
Bank of America

Susan Burke
Director, Knowledge Services
ANA

Casey Burnett
Lead Consultant and Director
West Coast Operations
Roth Associates

Terri Burns
Marketing Strategic Sourcing
Consultant
AFLAC, Inc.

Veda Burns
Marketing Procurement Manager
Coca-Cola Company

Nicholas Byrd
Client Finance Director
Razorfish

Michael Byrne
NY Chief Financial Officer
JWT

Steven Cadieux
Vice President, Procurement
Lion ReSources, Inc.

John Caffera
Executive Vice President/
Executive Producer
EUE/Screen Gems

Chris Calabretta
Vice President NACP
& Global Marketing Category
Janssen Pharmaceutica Inc.

Cliff Campeau
**AARM | Advertising Audit & Risk
Management Address**

Mike Cargiulo
Vice President Procurement
Comcast

Ron Caricofe
Supplier Manager
**Altria Consumer Engagement
Services**

Megan Carmody
Vice President, Global Category
Manager, Marketing and Communications,
Group Procurement
Zurich Financial Services



Registration List Cont.

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Alan Carr
Vice President, Controller
Saatchi & Saatchi
North America, Inc

Bob Cauley
Partner
Beekman Associates, LLC

Phil Chadwick
Senior Vice President, Controller
Hill Holliday LLC

Susan Charles
Vice President, Member Services
Association of Canadian
Advertisers, Inc.

Annie Chateauneuf
Expert Advisor
Federation Caisses Desjardins
Du Québec

Eric Chatelain
Head of Global Business Services
Procurement
Nestlé USA

Bob Christman
Vice President, Sales
Active International

Daniel Cisek
Finance Director
Chandler Chicco Companies

Kerry Cisek
Senior CSLT - Sourcing
Verizon Communications

Dustin Cohn
Chief Marketing Officer
Jockey International

Brett Colbert
Chief Procurement Officer
MDC Partners

Sandie Colon
Senior Director, Marketing Services
PostAds Group

Nicole Conrick
Director of Agency Management
Microsoft Corporation

Kate Corpus
Senior Manager, Agency Management
& Support Svc
Genentech

Nelson Cortez
Managing Partner
Cortex Media

André Coste
Worldwide Chief Financial Officer
Publicis Worldwide

Annamaria Cotroneo
Senior Global Sourcing Manager,
Advertising
Apple Inc.

Kim Courtney
Director Business Affairs
MillerCoors LLC

Kathy Cripps
President
Council of Public Relations Firms

Larry Cristini
Associate Director, Corporate
Advisory Services
Eurasia Group

Zorina Crooks
Professional Services Manager
Decideware Inc.

Sarah Cunningham
Vice President
TPN

J.R. D'Alessandro
Founder
Creative Services/
Video Opticals, Inc.

Jean Dabrowski
Senior Partner Executive
Operations Director
Ogilvy & Mather

Joe Daley
President
GSW Worldwide

Avi Dan
Founder
AvidanStrategies LLC

George Dan
Vice President, Procurement
North America
WPP Group USA, Inc.

John Daniels
Director, Business Management -
Vice President
Draftfcb Healthcare

Paul Daniusis
Executive Director
Platinum Rye Entertainment

Rick Darbourne
Head of Procurement - Corporate Services
Nestlé USA

Brian Davidson
Vice President, Member Relations
ANA

Joanne Davis
President
Joanne Davis Consulting, Inc.

Tom Dawson
Senior Vice President, Head of Global
Client Finance
Mediabrand

Michael Day
Chief Financial Officer, McCann
Healthcare Worldwide
McCann Worldgroup

Cynthia Del Rosario
Chief Marketing Strategist
TEAM

Michael DeNardo
Associate Director, Brand Identity
& Agency Management
Verizon Wireless Inc.

Stuart Diamond
Chief Financial Officer
GroupM

Dawn Dickie
Global Business Director
MindShare UK

Michelle Diehl
Executive Vice President/
Chief Financial Officer
Integer Midwest

Sekou Dilday
Sourcing Group Manager
Citizens Bank

Deb Dingwall
Director, Indirect Procurement -
Marketing
Kellogg Company

Registration List Cont.

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Carol DiSanto
President
Cline, Davis, & Mann, Inc.

Patty Dominguez
Senior Manager
Kraft Foods, Inc.

David Donnelly
Manager, Strategic Sourcing
The Hershey Company

Charles Doomany
Executive Vice President, Chief Operating
Officer & Chief Financial Officer
**Medical Specialists Communica-
tions Group**

Glenn Douglas
Territory Manager, Enterprise Sales
X+1

Sean Dowd
Global Strategic Sourcing Manager
Intel Corporation

David Drucker
Chief Financial Officer
Concentric Pharma Advertising

David Drucker
Vice President
STRATA

Heather Dudley
Marketing and Sales Director
isd inc.

Allan Duenas
Finance Director, Latin America
Young & Rubicam, Wunderman

Evelyn Duff
Advertising Services
The Nielsen Company

Bill Duggan
Group Executive Vice President
ANA

Alex Duncan
Director, Business Development
Simulmedia, Inc.

Paul Duxbury
Co-Founder and Director
SPIRE Worldwide

John Ebbert
Managing Editor
AdExchanger.com

Susan Eisenreich
Strategic Sourcing - Media
& Advertising, Manager
The Hershey Company

Andrew Eitelbach
Managing Editor
ANA Magazine

Omar Elamin
Finance Director
Leo Burnett

Tara Ennis
Director, Marketing Procurement
Johnson & Johnson

Francisco Escobar
Founder
JFE International Consultants

Chris Esposito
Chief Financial Officer Grey NY
Grey Worldwide

Kevin Esposito
Manager, Agency Operations
IBM Corporation

Jacob Evans
Global Commodity Manager
Dell Inc.

Steve Fajen
Partner
Drexler/Fajen & Partners LLC

Ken Fakler
Partner
Mitchell & Titus, LLP

Robert Familetti
Director
The Marketing Arm

Duke Fanelli
Senior Vice President, Marketing
and Communications
ANA

Kevin Farkas
Executive Vice President, Sales
and Business Development
Active International

Michael Farmer
Founder
Farmer & Company

Maribeth Fasseel
Senior Vice President, Finance
MARS Advertising, Inc.

Julie Fecteau
Manager, Agency Relations
Abbott Laboratories

Jonathan Fefer
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Bob Liodice
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Bob Liodice was appointed president and chief executive officer of the ANA in 2003. He was previously executive vice president, responsible for member relations and business development with a primary focus on strengthening relationships with ANA member companies and broadening the membership base. He joined the ANA as senior vice president in 1995. Prior to the ANA, Mr. Liodice was vice president of global marketing and sales for Grupo Televisa, a major worldwide broadcaster. Previous experience includes more than 15 years in marketing and financial management at Kraft General Foods, including having served as category marketing manager for the Jell-O and Bakers brands. He is a member of the boards of directors of The Advertising Council, Advertising Research Foundation, National Advertising Review Council, Partnership for a Drug-Free America, Advertising Educational Foundation and an executive committee member of the World Federation of Advertisers. Mr. Liodice holds bachelor degrees in accounting and management and an M.B.A. in finance from New York University.



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Marketing Procurement

Nestlé USA

Sopan Shah is the North American group manager of marketing procurement at Nestlé USA. Before Nestlé, Mr. Shah was on the corporate sourcing team at NBC Universal. He started his career in marketing procurement at General Mills. He is actively involved as a board member of the Arizona chapter of the world's largest student-run nonprofit organization AIESEC. Mr. Shah is a graduate of the W.P. Carey School of Business at Arizona State University, with a focus on supply chain management and international business.



David Beals
President and Chief
Executive Officer

R3:JLB

David Beals is president and chief executive officer of R3:JLB, a global consultancy that helps marketers improve the value and productivity of their marketing agency relationships. Mr. Beals has provided counsel to a diverse group of clients including the U.S. Army, S.C. Johnson, Wal-Mart, Whirlpool, Cisco Systems, Johnson & Johnson, Michelin, Merck, Welch's, Allstate, Wrigley, and Visa. He is author of the ANA's triennial Trends in Agency Compensation surveys and the latest ANA editions of *Evaluating Agency Performance* and *Agency Compensation: A Guidebook*. Prior to R3:JLB, Mr. Beals was a senior vice president, group account director at DDB and worked with a variety of the country's biggest and best-known advertisers, including Anheuser-Busch, McDonald's, General Mills, and Campbell Soup Company. He received a B.A. in international affairs from the University of Colorado and a master's degree in international management from the American Graduate School of International Management.

Speaker Bios Cont.

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Dustin Cohn
Chief Marketing Officer
Jockey International

Dustin Cohn is the chief marketing officer of Jockey International, makers and marketers of premium underwear, active wear, and apparel. During Mr. Cohn's 14 months at Jockey, he has initiated a company-wide transformational strategy and has begun a major rebranding effort. Prior to Jockey, he served as chief marketing officer of Optimer Brands, a Sterling Partners private equity portfolio company. Mr. Cohn served as PepsiCo's director of marketing for Gatorade and Propel. Prior to PepsiCo, he was vice president, management director at Element 79 Partners, leading the Gatorade advertising account group. Other agency experience includes Foote Cone & Belding and Bayer Bess Vanderwarker. Mr. Cohn began his marketing career at PepsiCo in the Pizza Hut division. He has a B.B.A. from the University of Wisconsin-Madison and successfully completed the executive leadership program at the Harvard Business School.



Larry Cristini
Associate Director,
Corporate Advisory Services
Eurasia Group

Larry Cristini is an associate director of corporate advisory services for Eurasia Group. He is responsible for business development initiatives and Eurasia Group's service delivery to multinational clients across a variety of sectors. Mr. Cristini has extensive experience helping corporations manage emerging market risks and integrate political risk management into corporate strategy, government relations, operations, and risk management functions. Prior to joining Eurasia Group, he was a senior consultant at Marsh, Inc., in the firm's reputational risk and crisis management practice. He was responsible for the development and delivery of Marsh's services in enterprise risk and crisis management planning, training, and exercising for corporate clients. In addition, he trained senior leadership teams on crisis management principles, decision-making, and strategy development. He also served on a 24/7 response team that provided real-time crisis support to corporations facing severe incidents. Mr. Cristini has conducted dozens of corporate exercises with executive teams focusing on events such as industrial accidents, terrorism, environmental disasters, product recalls, civil unrest, supply-chain disruptions, and natural disasters. He received a B.A. in political science (magna cum laude) from Providence College, and an M.B.A. with a concentration in international business from The George Washington University.



Bill Duggan
Group Executive
Vice President
ANA

Bill Duggan is group executive vice president at ANA. His responsibilities focus on management of the association's portfolio of marketing and media committees and associated conferences as well as thought leadership related to committees and conferences. Mr. Duggan also manages ANA's growing sponsorship program and was formerly executive editor of ANA's custom publication The Advertiser. He joined ANA in 2000, bringing extensive marketing and advertising experience gained on the agency side. Mr. Duggan worked in account management at Grey Advertising for 16 years, supervising major clients including Canon U.S.A. (winning two Effie Awards for effective advertising), Kraft Foods, SmithKline Beecham, and Sara Lee. He was also campaign manager for Grey Cares, an annual fundraising drive benefiting multiple charities. Mr. Duggan began his career in media at Dancer Fitzgerald Sample. He has been an adjunct faculty member at New York University's Stern School of Business, teaching advertising management on both the graduate and undergraduate levels. He has a bachelor's degree from Boston College and an M.B.A. from New York University.



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Paul Duxbury
Co-Founder and Director
SPIRE Worldwide

Paul Duxbury is co-founder and director of SPIRE Worldwide, a consultancy that specializes in building marketing capabilities to increase the effectiveness and efficiency of marketing spend. In this role, he has spent more than ten years working with many of the world's largest multinational companies, including SABMiller, Shell, and Universal Pictures. Before co-founding SPIRE, Mr. Duxbury had extensive experience in senior marketing roles in global, regional, and local offices, including stints as European marketing director for the Callaway Golf Company and global brand director for British American Tobacco. He became a fellow of the Chartered Institute of Marketing in 2005.

Kevin Farkas
Executive Vice President,
Sales and Business
Development
Active International

Kevin Farkas is executive vice president, sales and business development for Active International. In this role, he is responsible for managing a team of 15 internal and external sales executives who are focused on lead generation and driving top-line growth. Mr. Farkas joined the company in 1996 as accounting supervisor of U.S. operations and advanced to increasingly responsible financial management positions. He was appointed vice president and controller, U.S. operations prior to transitioning to sales. During his tenure in the finance division, his responsibilities spanned financial planning and analysis, budgeting, and structuring transactions for Active's Fortune 500 clients. In addition, he designed processes and internal controls in accordance with U.S. GAAP and helped the company reduce costs while growing revenues. Prior to joining Active International, Mr. Farkas was a senior financial analyst at Ciba-Geigy Corporation (currently Novartis), accounting manager at Fuji Photo Film, staff accountant at BTR, and internal auditor at Chemexec Relocation Systems, Inc. He holds a B.S. in finance from Central Connecticut State University and has completed the cash management program at New York University's Stern School of Business.



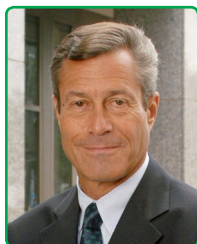
Rich Feitler
President
TPN

As president of TPN, part of the Omnicom Group, Rich Feitler oversees all aspects of agency operations and leads several key client relationships. He has extensive knowledge in retail and brand building and over 25 years of experience working closely with industry leaders such as Anheuser-Busch, Bank of America, Clorox, Hershey, Jockey, PepsiCo, Safeway, 7-Eleven, and Wal-Mart. Under his leadership, TPN became the first national agency to utilize Six Sigma to create a measurement-based culture centered on innovative ROI models and continuous improvement. Prior to joining TPN in 1996, Mr. Feitler led the corporate consulting division of ProServ, a leading international sports marketing firm. Before joining ProServ, he was in account service at DDB. He currently serves on the board of trustees of the Steppenwolf Theater and Vassar College. Mr. Feitler received his B.A. from Vassar College and an M.B.A. from Harvard Business School.

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Jim Garrity
Founder and Chief
Executive Officer

**BridgeTwoWorlds,
LLC**

Jim Garrity is the founder and chief executive officer of BridgeTwoWorlds, LLC., a marketing consultancy that helps advertisers, agencies, and digital media companies bridge the gap between the worlds of traditional and digital communications. Prior to his retirement from Wachovia in 2007, Mr. Garrity served as the company's chief marketing officer for more than a decade. Before joining Wachovia, he held executive roles in sales and marketing at both IBM (last position held was director of advertising, IBM U.S.) and Compaq, where he was vice president of communications. From 1995 to 2007 he served on the ANA board of directors which he chaired in 1998. Mr. Garrity founded the ANA New Technologies Committee (currently named the Digital Marketing Committee) in 1995 and chaired it until he retired from Wachovia. From 2009 until 2011, he served on the board of directors of Burst Media, until they were acquired by blinkx; from 2009 until 2012, he was the chairman of Canoe Ventures' advisory board. He is currently president of the Media Audit Council, chairman of Digitalsmiths' advisory board, co-chair of Linkable Networks' advisory board, and he serves on the advisory boards of Marketshare, Inc. and Evidon.

Bill Georges
President, Sales and Operations
Active International

Bill Georges is president of sales and operations at Active International. He is responsible for revenue growth at Active and has more than 18 years of marketing, advertising, and sales leadership experience. Earlier in his career Mr. Georges played competitive tennis, competing at the U.S. Open and playing on the ATP Tennis Tour. After a sports-related injury, he turned his full attention to the business world. As vice president of sales and sponsorships, he developed and sold integrated television, print, and radio sponsorships for the ATP tour, increasing revenues and enhancing the event's image. Mr. Georges joined Active in 2007; prior to that, he was senior vice president, advertising and affiliate sales for Comcast Networks, including E, Style, The Golf Channel, G4, AZN TV, and Sprout, where he maximized new revenue streams through new digital platforms and unique, integrated marketing programs.



George Giassopoulos
Director, Global Marketing
and Media Agencies
Global Procurement
and Operations
Pfizer Inc.

George Giassopoulos is director of global marketing and media agencies, global procurement and operations for Pfizer Inc. Mr. Giassopoulos joined Pfizer in 2007 and is responsible for designing and implementing the global sourcing strategy across all marketing agency and media categories, including creative, digital, public relations, consumer and professional media for all Pfizer business units. He was previously head of marketing procurement for Buyingteam Consultancy in the U.K., where he led reviews and delivered savings and process efficiencies for a number of high-profile organizations including Universal Music, Travelex, Reuters, and Comet. Throughout his career, Mr. Giassopoulos has held multiple senior marketing procurement positions for multinational companies, including Halifax Bank of Scotland and Vodafone. He has been an active member of ISBA (Institute of British Advertisers) in the U.K. since 2002 and, most recently, ANA in the U.S. He holds a B.Sc. in business administration and management and a master's degree in marketing from the University of Stirling.



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Ron Jensen
Director of Financial
Synergies
**Toyota Motor Sales
U.S.A.**

Ron Jensen is currently the director of financial synergies with Toyota Motor Sales U.S.A. His responsibilities include working across the three automotive divisions on agency agreements and marketing programs that can improve overall performance by developing agreements which align resources to performance outcomes. In addition to marketing responsibilities, he splits his time supporting other business units developing contract and sourcing strategies using a combination of contract and financial management skills. Prior to Toyota, Mr. Jensen spent over 20 years at Nissan North America with procurement responsibilities for the non-manufacturing spend in the U.S. His experience with Nissan also included responsibilities for development of a joint venture project with another manufacturer and the acquisition of franchised rental car companies to increase placement of vehicles in key markets. He is a licensed attorney with an emphasis on marketing contracts. Mr. Jensen holds an M.B.A from the University of California and a J. D. from Western State University College of Law.



Mark A. Kaline
Global Director, Media,
Licensing and Consumer
Services
**Kimberly-Clark
Corporation**

As global director of media, licensing and consumer services at Kimberly-Clark, Mark Kaline is responsible for directing global media operations in support of the company's business and marketing initiatives. In addition to his media role, Mr. Kaline leads the company's Global Digital Center of Excellence, the global brand licensing team, and the company's global consumer services team. With 30 years of advertising and media experience, he joined Kimberly-Clark in 2008, after serving 11 years as global media manager with the Ford Motor Company, responsible for the company's media operations and in-house branded entertainment team across all vehicle and service brands. Prior to joining Ford, Mr. Kaline spent 13 years at Campbell-Ewald Advertising in Detroit, where he was senior vice president, media director on the Chevrolet car business. He also headed network radio operations at Ogilvy-Mather in Chicago and has worked at several radio and television stations in the metropolitan Detroit area. Mr. Kaline serves on several industry association committees and boards of directors, including the ANA, Nielsen's advertiser advisory board, and the Council for Research Excellence. He holds a B.A. in telecommunications from Michigan State University.



Nicholas Kline
Senior Manager, Service and
Support Purchasing, Renault
Nissan Purchasing Organization
Regional Supplier Account Manager
– Americas
Nissan North America, Inc.

Nick Kline brings 16 years of experience in purchasing raw materials, finished goods, and services to his role as senior manager of service and support purchasing and regional supplier account manager for the Americas. For the last nine years, Mr. Kline has worked with Nissan to drive supplier value in the fields of information technology, facilities, human resources, travel, sales, and marketing. His current scope of responsibility includes all of Nissan and Infiniti's media, agency, print, market research, and Web site activities for Latin America, Mexico, the U.S., and Canada. Prior to working at Nissan's headquarters in Tennessee, Mr. Kline performed the same functions for Nissan Europe S.A. in Paris, France. Before joining Nissan, he worked at the corporate office of Fleetwood Enterprises, where he was responsible for domestic raw materials, imported finished goods, and warehouse/logistics services. Mr. Kline holds a B.S. in business from Cal Poly Pomona and an M.B.A. from Pepperdine University.

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Ron Kline
Director of Marketing,
Midmarket and Business
Partners Organization
IBM Corporation

Ron Kline is director of marketing in IBM's midmarket and business partners organization. He has global responsibility for market management, including midmarket offering management and segment planning. Mr. Kline leads IBM's midmarket advisory network program, building a community of clients to help pull direct client insights into IBM's midmarket strategies and execution. He has held positions in IBM's global technology services as a practice area leader in CRM business transformation outsourcing and as director of strategy and marketing at ibm.com. Mr. Kline joined IBM in 1982 and has held management positions in finance, pricing, and procurement as well as market planning and strategy. He has held management roles in various parts of IBM's business including the technology division, software group and EMEA where he was manager of hardware pricing and in the IBM Internet division when it was first formed. Mr. Kline holds a bachelor's degree in industrial engineering and management systems from West Virginia University and a master's degree in industrial engineering from Purdue University.



Tom Lagan
Director of Marketing
Services Procurement
Bayer HealthCare U.S.

Tom Lagan has served as director of marketing services procurement for Bayer HealthCare U.S. since 2007. He previously held positions of increasing responsibility in the areas of procurement, sourcing, and site operations, including the roles of procurement manager for Bayer's U.S. animal health group and marketing services sourcing manager for its U.S. pharmaceutical operations. His prior experience includes over 17 years in various roles within the sales, finance, and technical operations disciplines. Mr. Lagan holds a bachelor's degree in accounting and an M.B.A from the University of Connecticut as well as certifications in accounting and inventory management.



Shelley Landgraf
Owner/Founder
**The Landgraf
Consulting Group**

Shelley Landgraf brings to The Landgraf Consulting Group (TLG) a 360° perspective on the business and culture of advertising production. Skills honed from her 30 years of diverse experience make her uniquely qualified for this occupational niche. Early exposure to the film business as a child included acting in hundreds of TV commercials, episodic and films, before choosing to work on the other side of the camera. Ms. Landgraf learned her cornerstone production skills bidding and on-line producing at EUE Screen Gems on the Burbank Studios back lot. Those talents led to a move both geographically and philosophically, by producing commercials and pre-bid estimating for Advertising Agency, Campbell Mithun Esty in Minneapolis. In 1995, she completed the circle, joining advertiser Kraft Foods in Chicago as the regional production consultant for the Midwest, sharing the unique production business culture with corporate America. In 2004 she formed The Landgraf Consulting Group an independent production-consulting firm. Able now to leverage regions and advertiser spends, Ms. Landgraf and TLG introduced inter-agency programs, international best practices, production company partnerships, production guidelines and led corporate cost savings initiatives and training programs domestically and internationally – most recently in China. Now, The Landgraf Consulting Group, Inc. works with hundreds of marketing groups and advertising agencies on global and national brands maximizing client's budgets with a goal toward getting the best executional result. She has been an active member of the ANA Production Management Committee for 15 years.



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Gary Lee

President, **Ad Money**
Consultant, **Ad-ID**

Gary Lee is president of Ad Money, a consulting company that is trying to improve transparency, fairness and common sense throughout the advertising eco system. He is currently consulting with Ad-ID, which he passionately believes is the corner stone of a more efficient, accurate, ad industry. Mr. Lee was the chief financial officer of McCann Worldgroup. Prior to McCann, he was the chief operating officer and chief financial officer of Ogilvy North America and the chief financial officer and vice chairman of Ogilvy in Canada. He was also the chief financial officer at Pepsi-Cola Canada and chief financial officer for Standard Broadcasting. Mr. Lee has taught accounting at the University of Toronto and has been a non-executive chairman of a publicly traded hi-tech startup. And he was a chartered accountant for Arthur Andersen where he led the profit improvement consulting practice in Canada. Mr. Lee has been an active participant in AAAA/ANA initiatives on agency compensation, negotiations and contracting.



Brian Lesser

Chief Executive Officer
Xaxis

Brian Lesser is chief executive officer of Xaxis, a global digital advertising company that serves over 700 marketers in 13 markets. Mr. Lesser is responsible for delivering targeted digital media products that allow advertisers to reach and better understand their audiences on a massive scale. Prior to his current role, he was senior vice president and general manager of the Media Innovation Group (MIG), a company he founded in 2007. As the leader of MIG, he created the first integrated data management, targeting, and advertisement delivery platform for media agencies. Before leading MIG, he was vice president of product management and director of product marketing at 24/7 Real Media, a global media and technology firm acquired by WPP in 2007. He has over 15 years of experience in advertising and technology. Mr. Lesser is regularly quoted in digital marketing publications and has been a featured speaker at various industry conferences. He sits on the WPP digital advisory board and the GroupM global digital executive committee. Mr. Lesser holds a B.A. from the University of Pennsylvania and an M.B.A. from Columbia Business School.



John Lick

Executive Producer, Broadcast
Target

John Lick has served as executive producer of broadcast at Target Corporation for the past ten years. He and his team are responsible for the production of Target's television spots. Mr. Lick got his start in Los Angeles as a feature film and television sound effects designer and mixer then spent ten years as executive producer at Fresh Pictures, a Minneapolis-based commercial and documentary film production company. In 1995 his interest in advertising led him to a variety of freelance agency producer/executive producer positions. He was appointed head of broadcast at Marshall Fields before he transitioned to Target in 2002. Mr. Lick has been honored with production awards from the Clios, the Cannes Gold Lion, and Gold medals from the New York, Chicago and Los Angeles Film Festivals as well as a national Emmy in 1991 for his PBS documentary work. He currently co-chairs the ANA Production Management Committee, comprised of broadcast production executives from the nation's top television advertisers.

Speaker Bios Cont.

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Valerie Light

Sourcing Process Leader,
Broadcast Production
Manager for Television
and Radio

**Verizon
Communications**

Valerie Light is sourcing process leader, broadcast production manager for television and radio at Verizon Communications. In that position, she supports Verizon's marketing communications and branding efforts with agency partners McCann, MRM, Lopez Negrete Communications, AdAsia, and R/GA. She initially gained experience as an assistant at KLG Associates in Manhattan, founded by her father. Over 20 years later, her experience has expanded to encompass hundreds of productions in dozens of countries around the globe as a production company line producer, producer, and executive producer working with major advertisers and their advertising agencies, with responsibility for every aspect of production from bidding to actualization, with budgets ranging from \$50,000 to over \$5 million.



Steve Lightfoot

Communications
Procurement Manager

**World Federation
of Advertisers**

Steve Lightfoot is the communications procurement manager for the World Federation of Advertisers (WFA). He joined the WFA in 2005, and for seven years has been specializing in helping global sourcing organizations understand the marketing category. At WFA he works with a network of over 350 global marketing procurement specialists in over 60 markets, focusing on benchmarking the day-to-day sourcing operations of agency selection, management, remuneration, and performance reviews. Mr. Lightfoot regularly partners with other industry bodies via seminar or conference presentations, authoring papers and articles to promote the value that sourcing can bring within the marketing supply chain. In parallel, Mr. Lightfoot runs WFA's membership services programs, ensuring corporate members from the top 100 global advertisers and National Advertiser Associations from 55 major markets derive maximum value from WFA membership. Mr. Lightfoot is British, has worked in the UK, France and Belgium and holds a modern languages degree and research masters in marketing from the University of Leeds.

Barbara Martino

Executive Vice President,
Client Development

Active International

Barbara Martino is executive vice president, client development at Active International. Her primary focus is working with clients to support their corporate initiatives through the implementation of corporate trade. Ms. Martino brings more than 25 years of experience in marketing and advertising to Active International and has worked with a range of global consumer products companies as a brand-building partner. Prior to joining the firm in 2008, she was president and chief executive officer of G-Whiz, a full service advertising agency specializing in youth, entertainment, and lifestyle brands. Before assuming leadership of G-Whiz in 2000, Ms. Martino was executive vice president, account director at Grey Worldwide, where she was responsible for the company's youth client relationships, overseeing a staff of 40, and leading global and U.S. account operations. In this role, she also cofounded Indigo Entertainment, a Grey subsidiary with a focus on the development and production of children's television programming.



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Paul Matsen
Chief Marketing and
Communications Officer
Cleveland Clinic

Paul Matsen is chief marketing and communications officer at the Cleveland Clinic; he joined the Clinic in 2006. Mr. Matsen is responsible for all marketing and communications programs, including global development of the brand, marketing of key clinical lines of service, regional and international locations, and digital marketing. He also leads employee communications and public relations. Mr. Matsen has most recently served as executive vice president and chief marketing officer of Delta Air Lines. At Delta his accomplishments included the launch of the airline's first Web site, the launch of the SkyMiles frequent flyer program, and the joint Delta/American Express credit card. He played a pivotal role in the creation of one of the leading airline alliances, SkyTeam, which included partners such as Air France, Continental, and KLM Royal Dutch Airlines. Mr. Matsen began his career in New York working at a number of leading advertising agencies, including Grey and Young & Rubicam. He is active in the community, serving as a member of the board of trustees of Hathaway Brown School and Positively Cleveland. Mr. Matsen is a graduate of Rutgers University.



Hans Melotte
Vice President and Chief
Procurement Officer
Johnson & Johnson

Hans Melotte is the vice president and chief procurement officer for Johnson & Johnson, appointed to the position in 2010. Prior to joining Johnson and Johnson, Mr. Melotte was a partner in the Janssen health care innovation team, a small venture team with a goal to propel the company to become the leader in the health care solution business. He had previously held positions of increasing responsibilities in procurement, external manufacturing, supply chain, and planning in the Johnson & Johnson consumer group of companies. In 2010 Mr. Melotte was recognized as the Procurement Leader of the Year by Procurement Leaders Network, a global network of procurement and supply chain professionals around the world. He joined Johnson & Johnson in 1996, after a career with The Procter & Gamble Company and Coopers & Lybrand. Mr. Melotte has a master's degree in business from the University of Louvain (Belgium).



Kelly Mooney
Chief Executive Officer
Resource Interactive

Kelly Mooney was appointed chief executive officer at Resource Interactive in 2010. She joined Resource Interactive in 1995 as its first strategist; in 2001 the title president was added. She oversaw the firm's tenfold growth, while guiding the agency's portfolio of Fortune 500 clients. To heighten the agency's value to its clients, Ms. Mooney organized it into three vertically aligned portfolios: retail, consumer goods, and technology. In 2008 she conceived and launched the RI:Lab, an innovation and thought leadership hub that achieved early renown by developing one of the first Facebook commerce platforms. A sought-after keynote speaker, Ms. Mooney is the author of *The Ten Demandments* and *The Open Brand*. In addition, she is a member of YPO, a board member for Shop.org, the Procter & Gamble digital advisory board, and the Columbus College of Art and Design.

Speaker Bios Cont.

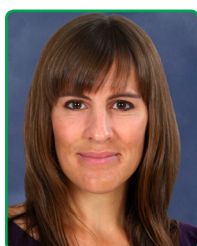
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Brendan Moorcroft
Chief Executive Officer
Mediabrand
Audience Platform

Brendan Moorcroft is the chief executive officer of the IPG Mediabrand Audience Platform, the specialist digital media platform company for IPG Mediabrand that includes Cadreon, Reprise Media, Spring Creek Group and Ansible Mobile. Prior to leading the platform group, he served as the senior vice president of global digital strategy for IPG Mediabrand and Universal McCann. His responsibilities included setting the digital strategy for UM's clients including Microsoft, Chrysler, Charles Schwab and others, as well as driving the digital business capabilities internally for Mediabrand. In this capacity, he co-founded Cadreon, Mediabrand leading Audience Marketplace. Before joining IPG Mediabrand, he served as the group director of engagement management for Organic where his clients included Sprint, Bank of America, Sony Playstation, NetApp, Samsung, Choice Hotels and The Reelz Channel. Prior to joining Organic, Mr. Moorcroft served as an associate director for Beyond Interactive where he specialized in technology marketing. His clients included Oracle, McAfee, VERTIAS Software, WellPoint (Blue Cross of California), IntraWest and several others. During his tenure at Beyond Interactive, he served as the Regional Media Director for Beyond's European operations based in London coordinating the European hub. Prior to joining Beyond Interactive, Mr. Moorcroft worked as a marketing consultant for Benefit Consultants, a marketing arm of Cendant Corporation.



Joanna O'Connell
Senior Analyst
Forrester Research

Joanna O'Connell joined Forrester Research in 2010 as a senior analyst serving interactive marketing professionals. She covers display marketing, audience targeting, optimization, and measurement, focusing specifically on marketer and vendor best practices in using display technologies and tactics as well as the measurement and improvement of results over time. She has more than ten years of experience in the interactive marketing industry, having begun her career at Avenue A in New York City as a digital media planner. Ms. O'Connell was later a founding member of Razorfish's ATOM systems agency trading desk. Most recently, she ran brand relations for the audience-on-demand practice at VivaKi, helping advertising clients target and optimize broad-reaching interactive campaigns. She has been featured on NPR's All Things Considered and is a frequent speaker and panelist. Ms. O'Connell graduated Phi Beta Kappa from Vassar College with a B.A. in psychology.



Greg Paull
Principal
R3:JLB

Greg Paull is a principal at R3:JLB. He began his career as a marketer and has spent 20-plus years living and working in Asia, the U.S., and Europe. In his agency life, he worked at Bates, Ogilvy, and in several roles at the Interpublic Group in Asia Pacific. Ten years ago he cofounded R3, an independent consultancy focused globally on improving marketing efficiency and effectiveness. In recent years, the company forged relationships with top Chinese brands such as Lenovo and Li Ning. In 2010, the firm merged with JLB to become R3:JLB globally. Clients also include Coca-Cola, Samsung, Singapore Airlines, Microsoft, Visa, and Johnson & Johnson. The firm works with 8 of the world's top 20 marketers in marketing and media ROI, research, agency reviews, and agency relationships.



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Michael Rose
Chief Executive Officer
Ease Commercial Services

Mike Rose is chief executive officer of Ease Commercial Services, a firm dedicated to securing production incentives for Fortune 100 advertisers and, along with Ease Entertainment Services, provides guidance to major film and television studios on state incentives. Ease also provides payroll services for crews on commercials, films, and television shows and publishes *The Official Guide to U.S. Production Incentives*. The company has managed over \$400 million in production incentives for its clients. Mr. Rose has 30 years of experience in marketing and management, having served as president of Dunn-Edwards; vice president of marketing with The Los Angeles Times; a management consultant with McKinsey & Co.; and a brand manager for The Procter & Gamble Company. Mr. Rose holds a B.A. from Northwestern University and an M.B.A. from Harvard Business School.



Alan Rutherford
Founding Partner
Axiology

A seasoned veteran of the marketing, advertising and media industries, Alan Rutherford is a founding partner of Axiology and chair of the Axiology group, a consultancy and marketing compliance and benchmarking group. He is a partner in Axis Consulting, a Chinese-based mergers and acquisitions firm, specializing in digital marketing services. Mr. Rutherford also sits on the board of OMP, one of the largest digital agencies in China. His previous executive roles include global chief executive officer of Digitas, worldwide head of media and marketing services at Unilever plc, and director of Ogilvy Europe and U.K. He joined the board of Sports Revolution as a non-executive director and recently joined the board of Picture Production Company. He chairs FacetoFace, a creative agency based in the Middle East, and Volume, one of the biggest independent digital marketing agencies in the U.K. Mr. Rutherford is world chairman and global president of the International Advertising Association (IAA). He chaired the IAA World Congress in Moscow, and last month he opened the Chinese International Advertising festival, sponsored by the State Administration for Industry and Commerce.



Sir Martin Sorrell
Chief Executive Officer
WPP

Sir Martin Sorrell joined WPP in 1986 as a director and become the group chief executive in the same year. He is a non-executive director of Formula One.

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John R. Swadener

Director, Marketing
Transformation Practice

**Pricewaterhouse-
Coopers, LLP**

John Swadener is a director at PricewaterhouseCoopers and leads the marketing transformation practice for the U.S. partnership of PwC. From a functional perspective, he focuses on improving businesses through the development of actionable marketing and sales strategies and performance improvement initiatives. With 20 years of experience, his clients span the products and services industries and financial services industries. Prior to joining PwC, he focused on marketing predictive analytics at Fair Isaac; online advertising and media at Razorfish; and strategy development at Ernst and Young. Mr. Swadener has an M.B.A. in finance and strategy from Indiana University and a master's degree in engineering from the University of Notre Dame.



Michael E. Thyen

Director, Marketing and
Sales Global Procurement

Eli Lilly and Company

Michael Thyen is the director of marketing and sales global procurement for Eli Lilly and Company. His department is responsible for spend category strategies, strategic sourcing and relationship management of advertising agencies and holding companies, market research, media planning and buying, marketing communications, exhibits and sponsorships and other marketing consulting services suppliers. Mr. Thyen joined Lilly in 1982 and focused the first 18 years of his career in various sales and marketing assignments, including retail and hospital sales, market research, sales management, public affairs, corporate accounts, brand management, new product planning, and business-to-business segment management. In 2000, he moved into the global procurement organization. He currently sits on the Editorial Advisory Board for MedAdNews and the President's Advisory Council for Xavier University. He is also co-chair of the Advertising Financial Management Committee of the ANA. Mr. Thyen graduated from Xavier University (Ohio) in 1979 with a B.S.B.A. in finance and from Indiana University in 1982 with a M.B.A. in marketing.



Brian Wieser

Senior Analyst

Pivotal Research

Brian Wieser is a senior analyst at Pivotal Research, an independent research firm. He currently covers IPG, Omnicom, WPP, Google, Yahoo, and Facebook and focuses on other advertising-supported media companies across various sub-sectors. Mr. Wieser's experience in media began at the intersection of traditional and emerging platforms when, in the mid-90s, he brought a college radio station onto the Internet. He subsequently worked as an investment banker and equity research analyst at Lehman Brothers and Deutsche Bank before spending seven years in the agency business as global director of forecasting for Interpublic's Magna Global. He gained firsthand experience in the venture-funded world of emerging media with a targeted television technology company called Simulmedia. Mr. Wieser returned to Wall Street last year as an equity research analyst with Pivotal Research. A chartered financial analyst (CFA) charterholder, Mr. Wieser holds an undergraduate degree in commerce from the University of British Columbia and an M.B.A. from the University of Western Ontario.



Speaker Bios Cont.

2012 ANA Advertising Financial Management Conference

presented by Active International



Douglas J. Wood
Partner
Reed Smith LLP

Doug Wood is a partner and co-chair of Reed Smith's media and entertainment industry group and the firm's advertising, technology and media group. He has more than 30 years' experience representing the entertainment and media industries, including individuals and multinational companies in motion pictures, publishing, advertising, marketing, promotions, unfair competition, intellectual property, and e-commerce matters. He is a member of the social and digital media task force and was a coeditor of the social media white paper entitled "Network Interference: A Legal Guide to the Commercial Risks and Rewards of the Social Media Phenomenon." Mr. Wood serves as general counsel to the ANA, the Advertising Research Foundation, and The Advertising Council. He is also the chief negotiator for the advertising industry in relations and collective bargaining with the Screen Actors Guild, the American Federation of Television and Radio Artists, and the American Federation of Musicians as well as the founder and chairman of the Global Advertising Lawyers Alliance. Mr. Wood is a frequent speaker, writer, and media commentator on a variety of marketing-related legal subjects. He holds a bachelor's degree in political science from the University of Rhode Island; a J.D. from the Franklin Pierce Law Center; and an LL.M. in trade regulation from New York University School of Law.



James R. Zambito
Senior Director, Agency
Management/Finance
Johnson & Johnson
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Group

As senior director of agency management/finance of Johnson & Johnson's global marketing group (GMG), Jim Zambito is responsible for financially optimizing the ongoing performance of advertising and marketing-related partners with the Johnson & Johnson operating companies they support. The GMG finance group supports worldwide media buying and planning, agency/holding company relations, including all digital agencies, marketing mix/budget reviews with operating company marketing finance, and Johnson & Johnson's caretaker of global equity. Mr. Zambito joined Johnson & Johnson in 1979, subsequently holding management positions in operations and marketing finance at McNeil Consumer Healthcare and corporate headquarters. From 1991-1999 he broadened his experience base accepting a senior finance position at Nelson Communications, a health care communications company now part of the Publicis Group. Mr. Zambito was a key member of the start-up team's medical advertising and education, public relations, sales detailing, and graphic arts businesses.

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- 9 | How Customer Centricity Propelled USAA To A Leader In Customer Loyalty [Webinar](#)
- 9 | Everything Facebook Really Needed To Know About Reaching People, It Learned From Local Television [Webinar](#)
- 10 | Legal Affairs [Committee](#) | New York, NY (Reed Smith)
- 15 | Social Media [Committee](#) | New York, NY
- 16 | MillerCoors Engages With Fans In The Digital & Social Media Space With A New Campaign [Webinar](#)
- 16 | Walmart Forges A Deeper Connection With Moms [Webinar](#)
- 17 | Sponsorship & Event Marketing [Committee](#) | Chicago, IL
- 22 | Mobile Marketing presented by Microsoft Advertising [Members Only Conference](#) | New York, NY
- 23 | Integrated Marketing @ St. Jude Children's Research Hospital [Members Only Conference](#) | Memphis, TN
- 23 | Advertising Production Management [Committee](#) | New York, NY
- 23 | Columbia Records: Music Goes Social [Webinar](#)
- 24 | The Digital Black Consumer (Multicultural Series) [Webinar](#)
- 30 | A Taste Of How The Coca-Cola Company Is Using Social Media Marketing To Connect With Consumers [Webinar](#)
- 30 | Learn How Sharpie Launched An Integrated Marketing Campaign To Engage Consumers [Webinar](#)

> June 2012

- 4 | The Art and Science of Brand Building [Training](#) | New York, NY
- 4 | Optimizing Agency Relations [Training](#) | New York, NY
- 4 | Maximize Ad Production Spending [Training](#) | New York, NY
- 5 | Media Leadership [Committee](#) | New York, NY
- 5 | Shopper Marketing [Committee](#) | Chicago, IL
- 6 | Marketing Innovation [Training](#) | New York, NY
- 7 | Agency Relations [Committee](#) | New York, NY
- 7 | Customer Insights @ GES presented by A+E Networks [Members Only Conference](#) | Dallas, TX
- 11 | Digital Marketing [Training](#) | Chicago, IL
- 11 | Elevating Your Career [Training](#) | Chicago, IL
- 12 | Agency Relations, West Coast Chapter [Committee](#) | San Francisco, CA
- 13 | Innovation @ MillerCoors presented by Brightline [Members Only Conference](#) | Chicago, IL
- 13 | Research & Measurement [Committee](#) | New York, NY
- 19 | Multicultural Marketing & Diversity [Committee](#) | New York, NY
- 20 | ANA/IEG Sponsorship & Event Marketing [Members Only Conference](#) | New York, NY
- 20 | Customer Insights @ Juniper Networks presented by Scripps Networks [Members Only Conference](#) | Sunnyvale, CA
- 20 | Selling Carrots with Bolthouse Farms: The Unique "Eat 'Em Like Junk Food" Integrated Campaign [Webinar](#)



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- 21 | Brand Management [Committee](#) | New York, NY
- 27 | Lessons From The Road: Intel Applying Neuroscience-Based Research [Webinar](#)
- 27 | Advertising Financial Management [Committee](#) | New York, NY
- 28 | Marketing Financial Management [Committee](#) | San Francisco, CA
- 28 | Mobile Marketing [Committee](#) | New York, NY

> July 2012

- 11 | Integrated Marketing [Committee](#) | Chicago, IL
- 15 | **2012 ANA Digital & Social Media Conference presented by Meredith** | Dana Point, CA
- 25 | Legal Affairs [Committee](#) | New York, NY (Reed Smith)
- 26 | Midwest Marketers [Committee](#) | Chicago, IL
- 26 | Asian Marketing Best Practices (Multicultural Series) [Webinar](#)

> August 2012

- 9 | Social Media [Committee](#) | New York, NY
- 14 | Advertising Production Management [Committee](#) | New York, NY
- 15 | Social Media, West Coast Chapter [Committee](#) | Seattle, WA
- 16 | Midwest Digital, Social & Mobile [Committee](#) | Chicago, IL
- 16 | Media Leadership, West Coast Chapter [Committee](#) | Northridge, CA
- 23 | Business-to-Business [Committee](#) | San Francisco, CA



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Agency Trading Desks

Basics Marketers Need to Know & Questions to Ask

The purpose of this document is to educate ANA members on agency trading desks regarding what they are, what they do, potential benefits, questions to ask, and more.

What Is an Agency Trading Desk?

There are various definitions, Forrester Research's description follows:

A centralized, service-based organization that serves as a managed service layer, typically on top of a licensed demand-side platform (DSP) and other audience buying technologies; manages programmatic, bid-based media and audience buying. Works as an agency's internal "center of excellence," supporting agency teams wishing to tap into this new buying model on behalf of agency clients.

Agency trading desks have also been described as:

- A dynamic way to purchase audiences, allowing media to be purchased in real time rather than from pre-procured inventory.
- Takes search (an auction based model) and applies that to display media; in a real time fashion like a stock exchange.
- An audience-buying company.
- A platform that uses data and technology to help advertisers more effectively purchase audiences at scale across digital media.

Media Impacted by Agency Trading Desks

The agency trading desk model was initially trialed on display advertising. This was done by tapping into auction-based advertising exchanges such as Google's DoubleClick Ad Exchange, Yahoo!'s Right Media Exchange, and other sources of real-time bidding (RTB) supply (companies that provide publishers with tools to make inventory biddable and better manage yield optimization across buyers) through DSPs. Generally speaking, the inventory made available through these supply sources has been inventory that publishers had traditionally allowed advertising networks to sell which was considered unsold inventory.

In addition to display, agency trading desks are also now actively buying online video, mobile, social media, and search. Agency trading desks may also be buying digital out of home and addressable television in some very limited instances.

Who Has Agency Trading Desks?

All the major holding companies and a few independents have agency trading desks.

Holding Companies

- Havas – Adnetik (spun off as an independent company in 2010)
- IPG – Mediabrands Audience Platform (includes Cadreon)
- MDC – Varick Media Management
- Omnicom – Accuen
- Publicis – Audience on Demand
- WPP – Xaxis

The holding company trading desks primarily service that holding company's media buying agencies and clients.

Independents

- Accordant Media
- The Trade Desk

The Origin of Agency Trading Desks

The first agency trading desks started in 2007 or 2008 and came into existence for these fundamental reasons:

- **High Cost of Digital Agency Labor:** The labor costs associated with delivering/buying digital media can be up to three times higher than traditional media. Agencies continue to seek ways to be more effective and more efficient.
- **Advent of New Technology:** As new technology and targeting tools became available, agencies invested in platforms which have enabled them to manage data and targeting for clients “in house.” Since audience buying is more automated, it dramatically reduces workloads in a very complicated, operations-heavy environment.
- **High Margins and Decreasing Value Creation of Intermediaries:** Due to the complex nature of digital, it has attracted many intermediaries, such as ad networks between clients/agencies and publishers. The perspective of agency trading desks is that those intermediaries provide little additive value. Further, ad networks historically have had very high margins (perhaps as high as 70 percent). Agencies sought to recapture a portion of that margin for themselves and their clients.
- **Reduction of Waste:** Agencies and clients were attempting to reduce waste and discover a better way to target in order to improve performance. “Contextual advertising is inherently wasteful because as much as 90 percent of the people targeted in this way may not be in the market for your product,” noted a senior agency executive.
- **Attracting and Keeping New Talent:** The historical digital media planning and buying model is complex and administratively burdensome—requiring a considerable amount of time dealing with the “drudgery” of reconciliations and discrepancies. Audience buying allows agencies to realign talent towards data, technology, and automation, which can help attract new talent into the digital media industry. One agency executive noted that “operational complexity is killing our people.” The transition to agency trading desks frees up a substantial amount of administrative time and requires different skill sets that allow the industry to attract new people to the business.

Before You Even Decide To Conduct a Search

1. If you are considering replacing an incumbent agency (or reassigning a significant piece of incumbent business).

Before deciding to conduct a search, marketers should seriously evaluate whether or not a search is required. Agency searches can be expensive, time consuming, highly disruptive, and can drain company resources. Sometimes issues can be addressed with the existing client/agency relationship via a remediation process, a “last chance” warning given to the agency (as the agency may not even be aware of all the issues) or by simply switching the team at the agency.

There are many reasons for conducting a search. While those reasons include performance-related issues, they can also include changing business needs, new product introductions, leadership turnover, conflicts, missing competencies, and the need for specialty agencies.

When a client thinks a new agency is required for performance-related issues, the client should conduct a self-examination, asking questions such as:

- Is the problem with the agency a problem that we’ve had before (which might suggest that the client is the one who needs to change)?
- Were we the best client we could have been?
- Did we have a clear strategy?
- Did we provide a clear brief to the agency outlining campaign objectives, deliverables, and expectations?
- Did we pay the agency fairly for the work so that it could put its best talent on our account?
- Was the agency given clear and consistent feedback and sufficient time to respond?
- Was the approval process too onerous?
- Did we elevate the conversation to a higher level at the agency so that more senior agency leaders could also respond?

Clients must be honest with themselves as well as with their agencies (current agencies and potential new agencies, if it gets to that). Clients should be careful not to rationalize previous agency failures or put the entire fault on the other side. Ask honestly, “Is there something we could have done better/differently?”

Overall, the agency search process shouldn’t necessarily be about ultimately “fixing” the problems, as they may not realistically be fixable. It should simply be about putting them on the table—internally and with agencies—to focus on finding an agency that may be able to work within those parameters. Whatever the issues are, the agencies have probably experienced them with another client. With honest dialog about internal barriers, the agencies can share specific case studies regarding how they were successful given similar challenges.

2. Adding a new agency (without replacing an existing one).

Even if a potential search relates to a completely new requirement and not replacing a previous agency, a client must structure itself in a way that maximizes the likelihood that a new agency will be successful (sufficient budget, lead time, proper senior management support, a clear strategy and decision-making process, etc.).

If an agency is being added to provide new capabilities (i.e., in the digital/ mobile area), geographical reach, or bandwidth (i.e., non-core work going to tactical agencies), it is important for the marketer to define this clearly to both the incumbent agency and to any new prospective agencies contacted during the search to ensure clarity around roles and responsibilities.

Criticisms of Agency Trading Desks

Criticisms of agency trading desks include:

- **Lack of Transparency:** It's likely that in some cases clients aren't even aware that their digital media buys are being executed via agency trading desks. In ANA's research for this white paper, we found member knowledge about agency trading desks to be extremely limited.
- **Double Paying:** Some clients have expressed concern that they are paying their agencies to manage media and then paying again for the agency-acquired services of a trading desk.
- **Conflicts of Interest:** Agency trading desks act simultaneously as both agent and vendor (i.e., buyer and seller).
- **Marked-up Media:** Some agency trading desks buy media at their own risk and then resell that media to clients, often at a premium. A criticism regarding this approach is that the incremental cost is simply a mark-up and, building on the conflict of interest point, the trading desk cannot function as its client's agent if it has its own separate profit center for media.
- **Mandates:** It has been reported that some agencies/holding companies have taken the position to mandate that all network-based transactions be executed through their internal agency trading desks. That begs the question – are media agencies choosing the agency trading desk because it represents the best option for a client or because it is owned by its parent company?
- **Rebates:** Some agencies may help fund trading desk and technology infrastructure by getting rebates or discounts from publishers. Clients should be made fully aware of such rebates.
- **Operational Challenges:** Given that trading desks are such a new offering for agencies, some may have rushed into this new business without properly integrating this service into their overall business practice, causing issues around billing, reconciliation, ad serving, etc.

What Clients Need to Do

While agency trading desks could indeed offer many benefits, marketers need to be educated on how their company's money is being spent and take responsibility for understanding the pricing model, unique role, and value that each player in this sector provides.

Every holding company (and independent) conducts its business differently. Marketers who work with a trading desk should understand and be comfortable with their agencies' models. The following questions and action steps are important.

- Have a conversation with your agency and understand if a trading desk is being used for your business. Comment to agencies – the use of a trading desk should be clear and transparent with a client and discussed with a client before a trading desk is engaged. Agencies need to initiate discussions re: the value proposition of the trading desk and its compensation.
- Understand the business model of your trading desk. Ask your trading desk, “How do you make money? What are the costs for service? Costs for technology? Costs for data?” Determine whether or not the trading desk marks-up the cost of media.
- Understand which media is purchased via a trading desk. As noted earlier, the agency trading desk model was initially trialed on display but is also now actively buying online video, mobile, social media, and search (plus digital out of home and addressable television in very limited instances).
- Be clear on metrics. Those could include cost per lead, cost per acquisition, ROI on sales, or some other quantitative metric. Understand how the performance of the trading desk compares with previous buys not executed via a trading desk.

- Leverage the current working relationship with your agency and its institutional knowledge of your business and ask for a report on insights gleaned from your data.
- Ask if there are mandates, real or implied, for your agency to use its holding company's agency trading desk. An alternative would be for your agency or you to work directly with a DSP.
- While there may not be competitive issues within your media agency, remember that the trading desk can work on behalf of all the media agencies within the holding company. Understand how the trading desk addresses competitive conflicts. Ask how pricing is handled in an instance when two competitors are vying for the same inventory, "first rights" for premium inventory, and about the existence of firewalls.
- If not using a trading desk, consider a test. The benchmark would be performance on the alternative, i.e., media spend on an ad network.

Continue the Conversation

ANA invites comments from the industry on this blog: www.ana.net/atdblog

Acknowledgements

ANA conducted two recent roundtable discussions to better educate members on the topic of agency trading desks, and we would like to thank and acknowledge the participants:

Julie Berger

Vice President, Managing Director

Digital, Horizon Media

Teri Gallo

Vice President, Marketplace Development

Mediabrand's Audience Platform

Quentin George

Chief Innovation Officer

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David Gould

Executive Vice President,
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Starcom MediaVest Group

Brian Lesser

Chief Executive Officer

Xaxis

John Montgomery

Chief Operating Officer North America

GroupM Interaction

Joanna O'Connell

Senior Analyst

Forrester Research

November 2011

The Found Money of State Commercial Production Incentives

Many states now offer financial incentives to advertisers to shoot commercials in their states. Although such incentives originated about ten years ago, more recently they have expanded to additional states and have become increasingly attractive to advertisers. The savings can be quite significant, often ranging from between 15 to 30 percent of production spending in that state. The purpose of this paper is to provide an overview of these incentives, outline the process for participating, and make advertisers aware that there is competition to acquire this incentive money.

“All advertisers should be aware of the benefits of state commercial production incentives and the opportunities to positively impact production budgets.”



Valerie Light
Broadcast Production Manager
Verizon
Co-Chair, ANA Production Management Committee

Background

Pure and simple, production incentives help states create jobs and attract investment. Their long-term desire is to encourage infrastructure investment so that filmmaking (feature films, television programs and commercials) becomes an integral component of a state's industry and tax base. Several studies, by firms including Ernst & Young, show that for each production incentive dollar spent, some multiple of that dollar (e.g., four to seven times) is created in economic activity in the state where the project takes place.

The film and television industries have historically benefited greatly from these state production incentives. The incentives are clearly geared to reward companies for making the decision to produce in a particular state. Incentive programs target the companies that fund productions and give final approval on the shoot location. In the feature film arena, the largest recipients of these incentives are the major motion picture studios. More recently, advertisers have been participating. Savings can be achieved without sacrificing quality, as many states have been very successful in building the production infrastructure required by the industry.

“Shooting in a production incentive state can give advertisers the opportunity to put more of their production dollars up on screen, while simultaneously investing in local economies.”



John Lick
Executive Producer, Broadcast Production
Target Corporation
Co-Chair, ANA Production Management Committee

Expenses That Qualify for State Production Incentives

States base incentives on hiring as many locals and purchasing/renting as much as possible from local vendors. Typically, all expenditures incurred in the state related to pre-production, production, and post-production qualify for state production incentives, although specifics vary from state to state. These items can include:

- Labor expenses associated with crew and talent for work performed in the state
- Agency labor as it relates to the project, if the agency is located in the selected incentive state
- Location fees, sound stages
- Set design, set construction, props, lighting
- Purchase/rental of production equipment, production software
- Insurance purchased through in-state vendor
- Wardrobe, makeup, makeup accessories
- Airfare purchased through in-state travel agency or company
- Meals and lodging for people working on the production
- Vehicle rentals
- Film processing
- Post-production work, post-production equipment, post-production software
- Editing, sound mixing
- Special effects, visual effects, audio effects
- Music

None of the states prohibit bringing in out-of-state directors or talent; however, those expenditures would most likely not be considered allowable expenses for state production incentives.

The general rule of thumb is that the more the advertiser spends in the state, the greater the potential savings from the incentive.

“Investigating the feasibility of shooting your TV commercial in an incentive state should be part of every advertiser’s standard operating procedure. The tangible benefit is much-needed dollars that brands can funnel back into their campaigns and the risk, when managed properly, is negligible.”



Barbara Vollrath
Category Strategy Manager, Creative Agencies
Pfizer Inc.

The Process

Marketers are encouraged to exercise due diligence regarding production incentives and determine whether or not they wish to pursue them. Marketers should also be aware that the requirements of incentive programs can vary significantly from state to state. The necessary steps to go about this are:

Step 1: Most jobs, if not all, should be evaluated for the potential to shoot in an incentive state. Shoots that require particular scenery, weather, or talent may not be appropriate. In many cases, the potential to shoot in an incentive state can be determined at the pre-bid stage, before the job is bid out to production companies. If a brand's agency does not have in-house expertise, consultants are available to provide this service. Of course, the advertiser must consider not only the potential savings but also any additional expenses, including travel costs and the extra effort required to pursue the incentive.

Step 2: If a decision has been made at the pre-bid stage to shoot in, or seriously consider, an incentive state, then the job spec requirements from the agency to the production company should specify that at the bid stage. Further, the contract between the agency and the production company should explicitly stipulate that the production company is mandated to abide by all state laws and requirements for the state incentive and to provide all requested documentation.

Step 3: During the bidding stage, the production company should be provided a list of guidelines so that the company purchases/rents items in a manner that will qualify the expenditures for the incentive. Examples include purchasing airline tickets from a travel agent located within the target state and renting equipment from local vendors. It is imperative that the client receive confirmation that the production company understands and will comply with the required guidelines. These decisions could affect their bid.

Step 4: At the shoot stage, the crew will be required to provide, along with all start-of-employment paperwork, proof of residency for those states requiring such proof. In many states, personal service corporations, also called loan-out corporations (i.e., corporations set up to loan out the services of talent, directors, DPs) will be required to be registered or incorporated in that state and pay appropriate state withholding to qualify for the incentive.

Step 5: Upon completion of the shoot, the agency and client must provide copies of travel expense reports. Many of those expenses will qualify for the incentive; what specifically qualifies varies from state to state. In addition, the agency must provide proof of payment for expenditures such as talent session fees, residuals for talent (for states in which those items qualify), post-production expenses and music if performed in the state. As the required paperwork is collected from the agency and production company, the advertiser may be contacted for clarification or to help speed up the process. The advertiser may also be required to post the state's logo somewhere on the company's web site in order to qualify for the incentive. Once the audit is complete and the state approves the incentive, the advertiser will usually receive compensation for the incentive within a year, depending on the state (some states require filing at year-end).

The list of states that offer commercial production incentives and the specific details for each state are continually evolving. Commercial production incentives are currently available from Alaska, Connecticut, Florida, Georgia, Hawaii, Illinois, Kentucky, Louisiana, Maryland, Mississippi, Missouri, Montana, New Mexico, North Carolina, Oklahoma, Pennsylvania, Puerto Rico, Texas, Washington, and West Virginia. California and New York—two long-time commercial production centers—have active state film offices but do not offer commercial production incentives that advertisers can utilize. While there may be other states that offer commercial production incentives, those with overly complicated processes have not been included in the aforementioned list.

All states are different—with different rules, application processes, and ways of inadvertently having the incentive disqualified, in part or in total. As with all state laws, the regulations can change rapidly, so having current information is critical. One resource available to help stay up to date on the various state policies is The Official Guide to United States Production Incentives at www.easecommercial.com.

"Production incentives are another tool that marketing procurement professionals can add to their tool box. Where appropriate, they can help optimize production investments without impacting creativity."

Johnson & Johnson

Sal Vitale
Category Management, Agencies
Johnson & Johnson

Case 1

Two professional athletes were engaged for a shoot. The location options were a non-incentive state and Chicago. Since one of the athletes was an Illinois resident and would qualify for the incentive, the advertiser selected Chicago. With a production budget of \$492,000, the advertiser was able to secure a net savings of \$121,000 (25 percent) by qualifying the fee paid to the celebrity talent in addition to the production costs.

Case 2

The advertiser intended to shoot in New York, with a production budget of \$1.3 million. By crossing over into Connecticut to a stage still within the union zone (and therefore not incurring union travel time), a net savings of \$200,000 (15 percent) was realized.

Whose Money Is It?

Production incentive rebates belong exclusively to the advertiser, not the production company or the agency. These rebates are assets associated with the advertiser and its trademarks and should be guarded like all other assets.

As noted above, the film and television industries have historically benefited greatly from these incentives and more recently advertisers have begun participating. States were initially slow to realize that in the advertising world marketers give the final approval on production recommendations as it's their money being spent. In many states, the initial production incentive legislation allowed only production companies to file for rebates; but some states have since realized the flaws in that requirement and more now allow the advertiser to file. It is clearly not the intention of any state to pay production incentives unbeknownst to advertisers for commercials they funded.

The AICP (Association of Independent Commercial Producers) is the trade association representing production companies. Marketers should be aware that AICP has advised its members that their position is that “production companies should receive the FULL benefit of the incentive.” ANA vigorously disagrees with that perspective as commercial production is funded by the advertisers. (It is recognized that there is extra administrative work/bookkeeping required from the production company and therefore an incremental fee should be added to the budget so that the production company does not incur an unreimbursed expense.) It is the advertiser who funds the production and gives final approval on the shoot location, not the production company.

Importantly, contracts with agencies and production companies should be written to reflect the fact that any production incentive associated with the work covered by that contract is the sole property of the advertiser.

“In the course of doing business, we always explore options to produce in incentive states, all other things, including production quality, being equal or better. The incentives frequently influence the decisions we make about where to direct our production projects.”



Debra Giampoli
Director of Global Strategic Agency Relations
Kraft Foods, Inc.

Summary

State commercial production incentives represent a meaningful opportunity for advertisers and states. It's a win-win situation. States have invested time and capital in creating these incentives to woo advertisers to shoot commercials in their state to help build their economies. Advertisers have a fiduciary responsibility to evaluate the use of these incentives. It is the advertiser's money and the advertiser's ultimate choice as to the selection of a production location. Advertisers should guard the financial incentives associated with their trademarks and copyrights. Utilized fully, these incentives can help significantly stretch marketing budgets.

Acknowledgements

We would like to recognize the following companies for their support of ANA's position on state commercial production incentives.

- Advertising Production Resources (APR)
- Bird Bonette Stauderman
- Ease Commercial Services
- Ernst-Van Praag
- The Landgraf Consulting Group
- Madison Advertising Management
- Mavis & Co.
- MBc services
- MRA
- Triad Consulting Corporation

April 2012

ANA/4A's Guidelines for Agency Search

Marketers and their agencies are looking for high-performance relationships based on mutual trust. Steps that can help marketers and agencies reach that productive state have been outlined from time to time. However, there has not been recent comprehensive guidance on agency search that recognizes the rapidly changing agency-advertiser marketplace.

The guidance that follows—developed and endorsed by the Association of National Advertisers (ANA) and the American Association of Advertising Agencies (4A's)—outlines steps that can help marketers and agencies go through an effective search and selection process that can help both parties create a better working relationship.

Objective

The objective of this document is to provide guidelines for both clients and agencies to consider in the agency search and selection process. This has become an increasingly important topic as the business and marketing landscape becomes more diverse and fragmented, there has been a proliferation of new agencies with the growth of emerging digital and mobile media, and there has been an expanded desire for specialty expertise/new perspectives to complement (or replace) existing agencies of record. Marketers and their procurement teams as well as agencies can benefit from these guidelines for the agency search and selection process.

Background

When beginning a search, marketers should be transparent with agencies regarding the nature of the search, the desired going-forward relationship, and the scope, timing, and economics of the assignment that is being reviewed. The ANA and 4A's recognize that the most common searches are for the following types of agency relationships:

- **Agency of Record (AOR) Search** – An AOR usually sets the strategic and communications direction for a brand (i.e., ongoing retainer-based relationships).
- **Roster Agency Search** – Could involve a review for a specific assignment or might entail a qualified vendor status review with no specific assignment as part of the roster review. A roster agency is one that has met the criteria to be considered for a client's brands but may not yet have been awarded a brand assignment.
- **Specialty Agency Search** – These are agencies that have a specific expertise (e.g., mobile, event marketing, digital, social, media planning and/or buying, CRM, or collateral). These agencies often supplement an AOR or an existing roster.
- **International Agency Search** – This is usually for an AOR to handle a brand globally or in multiple markets around the world. This is usually done to identify a lead office in a core market that will then coordinate efforts with other offices around the world.

- **Ad-hoc/Tactical Agency Searches** – Typically smaller to mid-sized agencies used for more routine, turnkey work at a lower cost with a shorter turnaround time. These agencies can complement other agencies on the roster and free up core agencies to do more strategic work.
- **Project Reviews** – Client searches for an agency to perform a specific, one-time deliverable.

The ANA and 4A's recognize that every agency search is different and that different searches may require clients and agencies to adapt these guidelines to their unique situations and circumstances. However, it is our belief that the following guidelines apply to the most common types of searches taking place today, and should be of value to both clients and agencies.

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Before You Even Decide To Conduct a Search

1. If you are considering replacing an incumbent agency (or reassigning a significant piece of incumbent business).

Before deciding to conduct a search, marketers should seriously evaluate whether or not a search is required. Agency searches can be expensive, time consuming, highly disruptive, and can drain company resources. Sometimes issues can be addressed with the existing client/agency relationship via a remediation process, a “last chance” warning given to the agency (as the agency may not even be aware of all the issues) or by simply switching the team at the agency.

There are many reasons for conducting a search. While those reasons include performance-related issues, they can also include changing business needs, new product introductions, leadership turnover, conflicts, missing competencies, and the need for specialty agencies.

When a client thinks a new agency is required for performance-related issues, the client should conduct a self-examination, asking questions such as:

- Is the problem with the agency a problem that we’ve had before (which might suggest that the client is the one who needs to change)?
- Were we the best client we could have been?
- Did we have a clear strategy?
- Did we provide a clear brief to the agency outlining campaign objectives, deliverables, and expectations?
- Did we pay the agency fairly for the work so that it could put its best talent on our account?
- Was the agency given clear and consistent feedback and sufficient time to respond?
- Was the approval process too onerous?
- Did we elevate the conversation to a higher level at the agency so that more senior agency leaders could also respond?

Clients must be honest with themselves as well as with their agencies (current agencies and potential new agencies, if it gets to that). Clients should be careful not to rationalize previous agency failures or put the entire fault on the other side. Ask honestly, “Is there something we could have done better/differently?”

Overall, the agency search process shouldn’t necessarily be about ultimately “fixing” the problems, as they may not realistically be fixable. It should simply be about putting them on the table—internally and with agencies—to focus on finding an agency that may be able to work within those parameters. Whatever the issues are, the agencies have probably experienced them with another client. With honest dialog about internal barriers, the agencies can share specific case studies regarding how they were successful given similar challenges.

2. Adding a new agency (without replacing an existing one).

Even if a potential search relates to a completely new requirement and not replacing a previous agency, a client must structure itself in a way that maximizes the likelihood that a new agency will be successful (sufficient budget, lead time, proper senior management support, a clear strategy and decision-making process, etc.).

If an agency is being added to provide new capabilities (i.e., in the digital/ mobile area), geographical reach, or bandwidth (i.e., non-core work going to tactical agencies), it is important for the marketer to define this clearly to both the incumbent agency and to any new prospective agencies contacted during the search to ensure clarity around roles and responsibilities.

You're Conducting a Search—Initial Considerations

Once it has been determined that a search is required, here are initial considerations for the advertiser.

- Identify your internal search team. Ensure that the team is not too big and that the right people are on the team—the people who the agency will work with on a day-to-day basis and the senior leaders who will make final decisions about the work. Ensure that the team is empowered by senior management to make decisions. Include procurement, if applicable, and bring them in early. If procurement is involved, clarify whether its role will be as facilitator or driver. Clearly identify the influencers and the decision makers.
- Discuss the time commitments and responsibilities that will be required from the client search team. Continuity of involvement, attending planning sessions, alignment on expectations, process, and criteria, and active participation in all agency meetings are essential to conducting a well managed search process.
- Decide who will lead the pitch. Options could be procurement, marketing, or an external agency search consultant. Next identify a specific individual as “search leader.” Companies should assess whether or not they have the right skills and expertise in-house to conduct a search and the time to do so, without disrupting current business.
- Define objectives/requirements and be honest about them; e.g., don’t ask for strategy or innovation if you’re looking for operational efficiencies.
- Identify decision criteria upfront; prioritize and weigh that criteria.
- Have approval from senior leadership on objectives/requirements and decision criteria to ensure alignment.
- Agree on the service expectations, scope of work, and desired business outcomes you expect to derive from the new agency relationship. The expectations for the new agency relationship should specify the marketing budget range, agency compensation levels, and speed-to-market requirements. Once internal alignment on expectations is agreed upon, the marketer should—upon receipt of a signed confidentiality agreement—disclose expectations to potential agency candidates.
- Agree on the search approach. Options include:
 - ▶ Business is placed with another preferred supplier.
 - ▶ Streamlined “meet and greet” approach to allow the client to understand agency capabilities, recent experience, and potential resources to be applied to the business.
 - ▶ Full-blown agency pitch.
 - ▶ Trial assignment—fixed time period with clear deliverables and fair compensation, after which point the client and agency decide whether to extend and formalize the relationship.
- Identify and agree internally on a meaningful list of competitors—companies that you cannot share an agency with due to competitive conflicts. If conflicts are a material consideration for your business, then carefully detail critical conflict areas and state your conflict parameters in the initial communication with candidates.
- When placing business into review, clients should be transparent with the incumbent agency about what is being reviewed and if there will be a replacement agency or a complementary one added to the existing roster. Be clear on whether the prospective agency is an appropriate candidate for the review and where it stands in consideration. Have agencies sign a non-disclosure agreement before issuing the questionnaire.
- While searches for smaller assignments or reviews that entail a modest scope of deliverables and meetings could move more quickly, the optimal timing for the agency search process should be approximately three months:
 - ▶ Identification Phase: One week
 - ▶ RFI: Two to three weeks
 - ▶ RFP: Four to five weeks
 - ▶ Finalists: Six weeks

Initial List/Request for Information (RFI)

The purpose of the RFI is to request detailed information regarding the agency's profile, management team, organization chart and operating structure, business approach, financials, credentials, client list, and capabilities, and to motivate the best and most relevant agency candidates to apply. It typically also includes case studies and creative work samples that might further help the client understand the agency's capabilities.

At this stage, the client should prepare an outline identifying agency requirements such as geographic proximity, strategic needs, specific capabilities, industry experience, etc.

- Develop an initial RFI list, which should include no more than 10 to 15 agencies (then 6 to 8 for the RFP stage and up to 3 for the final round). Instead of a formal RFI, you can consider a more informal screening process, i.e., by phone, especially if it's for a smaller-scale search where you will consider a limited number of agencies.
- There are multiple ways to build an initial RFI list as well as to learn more about the agency landscape, especially if you are researching specialty agencies.
 - ▶ Consider agency resources already used by your company. Consider talking to your Agency of Record if it has boutique/specialty agencies within its holding company.
 - ▶ Peer experience.
 - ▶ Search consultant input, if applicable.
 - ▶ Identify conflicts (e.g., due to competitive issues) to eliminate candidates.
 - ▶ Consider geography and time zone needs: Is it necessary that the agency be in close physical proximity to the client or can the search be geographically broader in scope? Does the agency have the geographical coverage (i.e., locations in multiple international markets) to service your business?
 - ▶ Agency Web sites.
 - ▶ Access information and guidance from the 4A's and ANA.
 - the 4A's "Agency Search" information center and database at <http://bit.ly/aaCrX9>.
 - the ANA Marketing Knowledge Center at www.ana.net/agencyselection.

For additional industry, third-party, and subscription resources, refer to Appendix 1.

- Discuss key business terms upfront. These may include competitive conflicts, employee non-compete clauses, minority business requirements, women's/green commitments, audit requirements, travel policies, etc. Some of these points may be part of the contract with the winning agency; discuss them early to avoid surprises later. Share your contract template with them; ensure there aren't any legal or contractual "deal breakers" before you get too far into the process.
- Suggestions for the RFI to ensure a smoother process with faster turnaround time:
 - ▶ If you submit an RFI designed by your procurement department, ensure it is appropriate for the marketing industry and other indirect services. Your RFI should request basic agency information and pose relevant marketing questions that will help you assess an agency's capabilities, i.e., case studies, category experience, research capabilities, creative development processes, and any category conflicts.
 - ▶ Streamline any questionnaires or RFI documents to key questions (one to two pages maximum).
 - ▶ Decide on the questions/issues to be addressed in writing versus what should be discussed—an RFI is not a Request for Proposal (RFP).
 - ▶ Know why you are asking each question; ensure focus.
 - ▶ Allow agencies a realistic amount of time to respond to the RFI request. Allow at least two weeks for a short form, longer if it's a more-detailed questionnaire.

- ▶ Consider a template format for responses for easy comparisons of multiple agencies.
- ▶ Recognize that it takes time to review all the RFI information submitted by agency participants, urge agencies to be complete but succinct in their responses. Communicate word count limits upfront.
- At this stage, the client should also provide some basic information to the potential agencies to help them decide if the business is appropriate to pursue. This will help narrow the list further. This may include an introduction to the company, an overview of key business objectives and marketing challenges, expected scale/scope of the relationship, budget, and more.

You may also want to consider skipping a formal RFI/RFP process in favor of a fast-track, closed-search process where specific agencies are invited to discuss their capabilities, followed by a more in-depth discussion or speculative creative (spec) work with two to three finalists.

When the initial search outreach is being developed, include your “rules of the review” in communications with potential agency participants. The rules of the review should cover the planned review process elements, agency deliverables, time schedules, interim client/agency contacts, and any code of conduct do’s or don’ts. For example, if there is a policy that prohibits employees from accepting gifts, entertainment, or other items of value from suppliers or candidates, the policy should be communicated.

Semi-Finalists/Request for Proposal (RFP)

(for detailed discussions with six to eight agencies)

The purpose of the RFP is to invite prospective agencies to the next stage of the search process, where the marketer can assess the agency with more detailed information, and vice versa. During the RFP process, the marketer will be looking for a more in-depth view as to how the agency can meet the needs of the client, structure the team to service the account, and outline its overall approach to the business. This is also an opportunity to have a more in-depth discussion on business terms, such as contract requirements and compensation. The RFP process is also a great opportunity for the agency to get to know and assess the marketer as a potential partner.

- Before scheduling time with the agencies, marketers should conduct an internal “requirements” meeting to align stakeholders (i.e., marketing clients and procurement) on the RFP process, business requirements, and semifinancialist expectations.
- Hold a “grounding” meeting with all client participants prior to the beginning of agency presentations, to review requests made of agencies and the agency evaluation form.
- The client should be very clear in communicating requirements to the agencies, as better input leads to better output.
- Include a discussion on agency compensation early on. Don’t provide a specific budget for agency compensation, but consider providing a budget range. Cost must fit for both parties. What the client is willing to pay must fit the economics of what the agency is able and willing to provide—at a profit.
- Set budget expectations (media or project budget, depending upon the assignment).
- Discuss timetables, agency experience required, agency performance evaluation metrics (e.g., sales, copy testing, brand awareness, etc.), role of online, mobile, geography (regional, national, global, etc.).
- If there are important process capabilities (e.g., billing formats, payment methods, status reporting), discuss them.
- Provide adequate access to the client for agency questions, and ensure a fair playing field by providing equal access to clients and any supporting materials (i.e., details about the campaign) for all competing agencies.
- It is strongly advised that you visit the agency candidates in their offices at some point in the review process. Ideally schedule each semifinalist meeting on the agency’s premises because an agency that may have been sixth on your list could jump to first place (and vice versa), once you see how the firm operates in its own environment. If that cannot be arranged and the semifinalist meeting will be held at the client’s location or a neutral site, allow each agency a minimum of one-hour setup time and provide them with room layout and audio-visual specifications well in advance of the meeting.

- During the process, insist on meeting key people who will actually work on your business and constitute your senior team. Visiting the agency provides the opportunity to meet more members of the team, whereas agency trips to a client's office will most likely involve meetings comprised of a smaller agency team.
- Good chemistry with a prospective agency is essential. Ask yourself, "Do I like these people and can we work together?"
- A note on culture: though culture is invisible, it presents itself in many conspicuous ways. Beyond assessment of an agency's core competencies (e.g., copy, media, research) and administrative processes, another key assessment should concern its ability to fit your company's culture. Cultural conflicts will almost certainly sabotage an advertiser-agency relationship, regardless of how well an agency's core competencies and administrative processes match an advertiser's needs. Hence, the importance of cultural alignment cannot be overstated. A supplemental discussion on culture can be found in Appendix 2.
- Today clients usually work with a number of agencies, so it's also important to know that a new agency will complement other agencies on the roster, and they will be able to work collaboratively for a common goal.
- Schedule enough time in the meeting. Allow a minimum of two hours to ensure there's time for you to tell the agency about your business, for the agency to present its capabilities, and for concluding questions and discussion.
- Don't just answer the agencies' questions, evaluate them. What an agency asks can often reveal: 1) its actual interest/involvement in the business, 2) its work processes, and 3) its ability to effectively collaborate.
- Much can be learned about an agency by the questions they ask. Ensure a fair playing field with your agencies in handling questions. Some marketers disseminate a question from one agency to all selected agencies and distribute their responses to all participants. The downside to this approach is that many agencies will be reluctant to ask strategic questions for fear of revealing to competitors a planned approach to the pitch. Consider circulating to the agency field only those questions and answers that clarify the assignment or process.
- When viewing case studies from agency candidates, be mindful that some of that work may have been produced by people who have left the agency—and it's possible that it could be shown by more than one agency. If a specific case study or piece of work captures your attention, ask if the key players involved still work at the agency.
- Marketers should provide continual and timely communication to prospective agencies on process and next steps, including any delays or changes in timeline.
- Develop a simple, focused evaluation form for the client team, and complete it immediately after each meeting.
- Create a process that allows client team members to initially give feedback individually to avoid any bias from a group environment. Then bring the team together to discuss perceived agency strengths, weaknesses, and whether or not the agency fits the brand/corporate culture.

Finalists

(up to three agencies)

Guidance for the finalist stage include some of the same criteria from prior stages plus new thinking.

Pre-Final Guidance (Preparation for the Finalists' Meetings)

- Clearly set expectations on the deliverables for the final round; a written brief should be provided that outlines those expectations. If new strategic, company, or consumer research is to be provided, hold a briefing. If time is a constraint, major briefings can be conducted with agency finalists collectively, with time reserved for them to engage individually regarding questions and clarification. Clearly articulate required deliverables and match your brief and briefing as stimulus to obtain those deliverables.
- Make the final-round assignment as “real life” as possible. The final assignment should simulate how you would work with your agency partner. Again, be clear about the specific output or deliverable(s) desired and expected; specifically, whether it is a strategic plan, a transition plan, or an agency viewpoint.
- Not all reviews need to end with a creative shoot out. Much can be learned about how an agency solves a problem with a different kind of assignment. Consider whether spec creative work is indeed required. If spec work is required, consider paying a stipend to cover some of the agency's out-of-pocket costs. Please refer to Appendix 3 for additional discussion and guidance related to speculative assignments.
- The client should have no ownership rights over creative work or intellectual property developed by the agency unless that has been agreed to in advance, and the client pays a fair and reasonable fee for ownership. Note that this is much more than a stipend.
- Provide adequate access to the client for agency questions during the final round. Remember that agency questions at this point in the search can be indicative of the agency's process and reflect its planned strategic approach. Consequently, it's recommended that questions from an individual agency and the marketer's response not be shared with the other competing agencies.
- Continue to evaluate chemistry and culture. For example, consider having a dinner or out-of-office lunch with each finalist agency. At this stage, the client should have visited the agencies in their offices to meet more of their staff, assess their teamwork, and get a sense of the agency's culture and personality.
- Provide the agency with evaluation criteria and weighting for both the final round and the ongoing relationship. Clearly define the meaning of success.
- Provide continual and timely communication on process and next steps.

Final Day Guidance (Conducting the Finalists' Meetings)

- Conduct a discussion with each finalist to ascertain the logistical specifications related to their final presentations. Allow the agency access to any audio-visual equipment if the pitch is on site. Information about the presentation room can be very important to the agencies. Provide room dimensions (photo, if possible), specifications of available equipment, including monitor(s), screen, ceiling or table projector, aspect ratio, etc. It's helpful to provide the contact information of the person in your organization who will receive shipments the agencies send to your site before the presentation. Allow each agency a full hour to set up in advance of the presentation and provide IT support to answer equipment questions.
- Provide the agency with a list of all clients expected to attend the meeting. Your information should include the titles and functional responsibilities of each client participant.
- Have a “grounding” meeting with the client team prior to the beginning of the agency presentations to review what was requested from the agencies and the evaluation form.
- Allow sufficient time for the agency to answer the brief and adequately show its work.
- Clearly communicate the amount of time allocated to each agency to present and the amount of time, if any, you wish to reserve for questions and answers.

- Adhere to your timetable. Don't indulge an agency that exceeds its allotted time or penalize an agency if you start the meeting late.

Post-Final Guidance (After the Finalists' Meetings)

- Acknowledge the fact that great work from great agencies comes from a great relationship with a great client. During the selection process, think about whether you can get to a great relationship with this agency and whether they can work effectively with other agencies. Spend enough time with them to have a good sense of that by the end of the process.
- Develop a simple and focused evaluation form for the client team that includes agreed-upon criteria and weighting. Complete the form immediately after each meeting.
- After you've seen all the agencies for the final time, meet as a team to discuss and decide. Ensure that the team is aligned on the selection, even if it's not unanimous.
- It is advisable to notify the winning agency that it is considered the company's number one choice but that the final decision is pending reaching agreement on key contract provisions. The other agencies should not be contacted yet, since failure to reach an acceptable agreement with the lead agency candidate may require that the client pursue an alternative solution.
- Once an agreement has been reached with the winning agency, inform other agencies at the same time via back-to-back calls.
- Offer non-winning agencies a debrief call at a later time to provide them with honest and actionable feedback on their approach, people, final presentation, and to allow them to ask questions. The 4A's has a [post-review feedback tool \(http://bit.ly/qkExbl\)](http://bit.ly/qkExbl) that highlights important feedback categories and a ranking scale that can easily be adapted to online or telephonic debrief format.
- If the review drags on, the entire process is at risk as agency talent that was originally available during the review may be reassigned, or the agency may even decide to back-out of your search and participate in an agency RFP with a competitor.
- Remember that this is a search based on business needs and is not a beauty contest. In the final selection process, clients should regularly refer back to their selection criteria.

You've Received an RFI or RFP—Now What?

- If it is not clear, clarify what the assignment is asking from your agency as well as the role of other agencies and the client's in-house staff.
- Carefully review the assignment and the client fit and quickly determine if it is a good opportunity for your agency. Regardless of your decision to engage or not, promptly respond to the prospective client or search consultant with an indication of your intent.
- If you decline the opportunity to pitch, tell the client why. There is a lot of learning in that answer. Was it outside your capabilities or was there something about the way the client defined its objectives or assignment?
- In developing your response, follow the directions and guidance given, answer the questions being asked, and be specific about your core capabilities, experience, and what you do best. Don't go "off the ranch" as the client may not be able to make apples-to-apples comparisons with other agencies (and may quickly eliminate you as a result).
- Be honest about your capabilities relevant to what the client is seeking. Pursuing a piece of business that isn't a good match ultimately wastes resources and possibly damages a future relationship. Don't be afraid to answer questions with "we don't do that" or "that's not our sweet spot, but..." Being transparent tells a client a lot about you, and if you're not right for this assignment, the client may think of your firm for other projects.
- Differentiate your agency. From the beginning, put a clear and meaningful stake in the ground about what differentiates your agency. The differentiator does not necessarily have to relate to capabilities. It could be culture, process, or a "secret sauce." Articulate how that differentiation is applicable to the potential client. Refer back to that differentiation often throughout the process so that the client can internalize if/how it could realistically and practically be of benefit. If there is something about what the client is requesting that will prevent or limit your ability to apply your differentiators, let them know.
- Disclose all competitors you are working with, as well as all client relationships, as the potential client may have a unique view on conflicts, or you may be able to work out an acceptable solution with any competitive issues (i.e., firewalling the competitor from your business by using an entirely separate account team, on a separate floor or even in a separate office or city, if available).
- Be courageous enough to discuss compensation implications early, even if the client doesn't bring it up. Setting expectations early on both sides could prevent future compensation issues that create tension in the relationship.

You've Made the Cut—Optimizing the RFP/Pitch Process

- Take time to understand specific client needs, challenges, and the scope of the assignment. Understand if the client is looking for an ongoing relationship or one limited to a specific time or project. Be clear on the balance between strategic/creative requirements and executional/tactical deliverables.
- Ensure you are clear on the brief and project parameters such as success metrics (e.g., sales, brand awareness, etc.), geography (regional, national, global), role of new media, etc.
- Identify all questions or points requiring clarification that your team has regarding the RFP and schedule a conference call or meeting with the prospective client to address them. Remember, this step can be an important and evaluative one in making an impression on the prospective client.
- Be prepared to demonstrate that you can "play nice" with other agencies—not just within your agency family or holding company but with other agencies as well. In today's world of fragmented media, clients often have multiple agency partners so cooperation/collaboration among different agencies is essential.
- Discuss account staffing as it can have a significant impact on costs. Discuss staffing methodologies in more-general terms; once the scope of work has been determined, the staffing arrangements can be made more specific.

- Don't bait and switch. Don't send in the new business team to get the account and then assign another team to do the work. Ensure that the client meets the people who will work on its business and include at least one key account person. Clients should know that asking to meet the full account team may be an unreasonable request. In many cases, the team is not fully formed or the staff hired.
- The agency should be clear on which clients they will work with on a daily basis and who the key decision makers are.
- Identify if the agency has internal subsidiaries that are profit centers that would be used for the client's business. These may include production facilities, editing, in-house art studios, music, etc.
- When you show your agency's work, ensure that key players involved with each piece of work are still at the agency. If the core team has left, it's no longer appropriate to show that work.
- Agencies should strongly emphasize business results in their relevant case studies. Awards are nice but only if the recognized work increased the client's business. Focus on business outcomes and not always on how many boxes were sold, but why boxes were selected as the standard of measurement. Why not some other metric? Potential clients want to understand your agency's process and way of thinking.
- For the pitch, don't fill the room for the sake of filling the room. Everyone attending should have a role.

A Word About "Spec" Work

If a client offers a stipend to help defray costs, ensure that this does not imply ownership of the work even if you don't win the business. If compensation is offered that will grant the client the rights to the work, negotiate what you consider fair remuneration. If a client insists on ownership of work to invite your agency into the pitch, which is not a best practice for clients, you have a decision to make. It is inadvisable to surrender the rights to your work as a condition of pursuing the business.

If you plan to present additional ideas or alternative strategies, first ensure that the client's brief for the presentation has been adequately addressed.

Contract and Terms

- Formal agreement on service deliverables, agency compensation, and key contract terms are essential components of a best practice agency search process. Failure to establish mutually satisfactory commercial terms will undermine the viability of an ongoing relationship.
- Agencies should not agree to non-negotiable or unilateral client mandates that the agency considers inequitable or impractical in order to get the business with the hope that terms can be re-negotiated at a future date.
- If you take an assignment but either will be losing money or breaking even initially, be transparent with the client about that.
- Walk away if the assignment does not fit or feel right.

Getting Started and Planning for Success

Once the agency has been selected, an agreement should be formalized regarding the scope of services, scope of work, staffing plan, which agency team and/or key individuals will be working on the business, compensation, key contract parameters, and measures of agency evaluation.

Agree on a Relationship Management Process

The client and agency will have just expended a significant amount of energy and funds in the agency selection process. To help enhance the likelihood of a successful, long-term relationship, it is very helpful to include regular, informal check-ins and a structured, two-way evaluation feedback process that monitors checkpoints and deliverables, considers scope revisions, flushes out bottlenecks or other issues. This can also be a great time to identify longer-term ways to improve the efficiency and effectiveness of your relationship, especially if it expands or changes over time.

You may want to consider including a provision to revisit the terms of the engagement (services, contract, procedures, etc.) at established intervals. Despite best efforts to define the scope of expected benefits, scope of work, and critical business assumptions upfront, it's hard to know what the relationship will be like until you're actually working together.

Agency Relationships Are a Critical Strategic Investment: Invest Wisely

The challenges of dynamic expectations and the acceleration of technology and competitive forces that are shaping the marketing industry should not overwhelm the importance of adhering to prudent, well crafted, agency search and selection principles and practices. The wisdom of embracing solid fundamentals is more important than ever before in order for both sides to leverage their investment and to enjoy a long, productive relationship together.

October 2011

Appendix 1 - Industry Resources for Agency Search and Selection

Industry, third-party, and paid subscription resources are available such as:

1. 4As “Agency Search” information center and database at <http://bit.ly/aaCrX9>
2. ANA Marketing Knowledge Center at www.ana.net/agencyselection
3. Third-party resources such as Adbrands.net, Adforum.com, Adstrument.com, AgencyCompile.com, Agencyfinder.com, and MarketingMine.com
4. Industry publications including AdAge.com, AdWeek.com, and Campaign.com
5. Company inquiry sites: AccessConfidential.com, Hoovers.com, and TheListOnline.com
6. Creative library sites: CannesLions.com, Competitrack.com, Effie.org, Gunnreport.com, kantarmediana.com/AdScope, and Oneclub.org
7. Media representatives can be a good source for agency referrals.
8. For specialized capabilities, utilize trade associations to learn more about agencies in these areas:
 - ▶ 3AF - Asian American Advertising Federation (www.3af.org)
 - ▶ AHAA - Association of Hispanic Advertising Agencies (www.ahaa.org)
 - ▶ CEMA - Corporate Event Marketing Association (www.cemaonline.com)
 - ▶ Council of Public Relations Firms (www.prfirms.org)
 - ▶ DMA - Direct Marketing Association (www.newdma.org)
 - ▶ IAB - Interactive Advertising Bureau (www.iab.net)
 - ▶ MMA - Mobile Marketing Association (www.mmaglobal.com)
 - ▶ POPAI - Point of Purchase Advertising International (www.popai.com)
 - ▶ WOMMA - Word of Mouth Marketing Association (www.womma.org)
9. There are advertising associations in most major overseas markets including:
 - ▶ Brazil - ABAP / Brazilian Association of Advertising Agencies (www.abap.com.br)
 - ▶ Canada - ACA / Association of Canadian Advertisers (www.acaweb.ca)
 - ▶ Canada - ICA / The Institute of Communication Agencies (www.icacanada.ca)
 - ▶ Canada, Quebec - AAPQ / Association of Quebec Advertising Agencies (www.aapq.ca)
 - ▶ China - CAA / China Advertising Association (www.cnadtop.com)
 - ▶ China - China4A / The Association of Accredited Advertising Agencies of China (www.china4a.org)
 - ▶ Europe - EACA / European Association of Communications Agencies (www.eaca.be)
 - ▶ Global - WFA / World Federation of Advertisers (www.wfanet.org)
 - ▶ India - AAI / Advertising Agencies Association of India (www.aaaindia.org)
 - ▶ Japan - JAAA / Japan Advertising Agencies Association (www.jaaa.ne.jp)
 - ▶ Mexico - AMAP / Mexican Association of Advertising Agencies (www.amap.com.mx)
 - ▶ Russia - RACA / Russian Association of Advertising Agencies (www.akarussia.ru)
 - ▶ United Kingdom - IPA / Institute of Practitioners in Advertising (www.ipa.co.uk)
 - ▶ United Kingdom - ISBA / Incorporated Society of British Advertisers (www.isba.org.uk)

It is important that marketers understand the information provider’s membership requirements or revenue model, since “pay for play” listings will likely be incomplete because many agencies will not pay to be listed.

Appendix 2 - Cultural Compatibility

Selecting a partner is as much about a strong chemistry and values match as it is about brass tacks capabilities. Beyond your assessment of an agency's core competencies (e.g., copy, media, research) and administrative processes, another key assessment should concern its ability to fit your company's culture. With the turnover rate in the business, it is critical that you select the whole agency, complete with its values, staff, orientation, operations, ownership, and culture—not the handful of people who have pitched your business.

Corporate culture governs how things are done. It is the fabric that holds a company together, and it is the ever-present management ethos that drives decisions when supervisors aren't around. The best way to determine if your values complement an agency's corporate culture is to visit and see firsthand how it operates.

First, know yourself and the answers to the questions you asked yourself at the beginning of the review process. Second, know the behavior that you value in a partner and evaluate the agencies according to that standard.

In visiting an agency, clues regarding their values and culture can be found everywhere. It determines what they consider important, what is rewarded, and how they behave.

Points that should be taken into account include:

- **Environment:** What is their environment like? Is it formal or informal? Quiet or loud? Empty or buzzing? Industrious or ambivalent? Safe or dangerous? Well kept or run down? Open or closed? Clean or dirty? What appears to be the relationship between private and public space? Are there any obvious amenities that you see like a cafe, childcare, or concierge? How do they communicate with each other about office events or news—through bulletin boards or monitors? How would you describe the office's ambience, the agency's energy, its staff?
- **Policies and practices:** Do titles, structure, and hierarchy seem to be important, or is the atmosphere more collegial? Do there seem to be any unspoken rules at play regarding dress code or interaction? What do you observe as to how departments are positioned, treated, or interact? Is the agency as proud to show you IT, operations, production, and the studio as the creative department? Finally, ask about what is rewarded if it isn't obvious—which accomplishments are celebrated and which performances get bonuses?
- **Who works there:** What does the staff look like? Is it younger or older? Diverse or not? What seems to be the agency's philosophy about staff? Permanent versus permalancers versus freelancers? What's the turnover rate? How do people interact with each other—do they seem formal? Familiar? Friendly? Do they trust each other? Do people appear to know what their roles are and how they fit into the bigger picture? Are they helpful and service oriented?
- **Meetings:** You can tell a great deal about an agency by how meetings are conducted. Is food important? Is there a sense of style and an aesthetic demonstrated in setting up a meeting? Are introductions formal or casual? As meeting participants, are you commingled with agency staff or seated on the opposite side of the table? Does the agency have a handle on technology and how it all works together—display, slides, video—or do they get tangled up in it? Do they have well-defined roles and yet interact well as a team to cover off key points and information?

In summary, the RFI or RFP process should give you a clear understanding of the agency's history, positioning and ranking, leadership, financial status, professional capabilities, and the folklore that influences its storytelling and reputation. Your visit to the agency should have softer criteria, driven by experience and impressions. It's the time to take everything in and see how the agency's values and culture mesh with yours—if this is a partner that you can and want to spend considerable time with working to solve your company's or brand's business problems.

Appendix 3 - Thoughts on “Spec” Creative Assignments—Also Known as Shootouts

The final presentation phase is typically designed to require that the agencies demonstrate their specific thinking on behalf of the prospective client.

If the marketer and the agency finalists believe that it will be beneficial to acquire more in-depth, collaborative interaction as means to inform the decision, the marketer should brief a select few finalists (up to three agencies) and ask for presentations in response to an assignment that specifically addresses the marketer’s issues.

Spec Work Background

One of the more-debated aspects of the agency search process is whether to include a speculative work phase. At this point, you should consider whether you are shopping for a new agency relationship, a new strategic solution, a new campaign platform, or a specific project deliverable. In each case, clear communication about the expectations of agency deliverables will help you obtain the desired results.

Begin with the assumption that an agency’s past work is the best example of how it works in a day-to-day collaborative relationship with a client to develop campaigns that solve business problems and that this is often the best testament to its capabilities. Additionally:

- Remember that some agencies have policies against spec creative—will asking for it eliminate your top agency contenders?
- In many reported cases, the speculative recommendations made by the winner are not implemented.
- Having a good outcome (applicable creative) from a speculative creative process will require a bigger time commitment for collaboration from the client during the process. It is virtually impossible to create a working relationship similar to the way you work with an agency in the “real world” with multiple finalist agencies in a short period of time. Also, since it is not possible for the agency to really know enough about all the variables (scope of work, timing, or other client needs) and they are being asked to work under tight time constraints, you are likely to have a “pitch” team in lieu of or, in addition to, a “real” team. This is because the best agencies typically don’t have their best creative talent sitting in a room waiting for a pitch to cross their desks.

Spec Work or No Spec Work

If you are shopping for an agency relationship and do not have an immediate campaign deliverable, consider asking the agency to demonstrate how they would approach solving a problem strategically, or ask their point of view on a topic that is of interest to you rather than issue a speculative creative assignment.

If speculative creative is necessary to facilitate a decision, consider how you will:

- Make the assignment and deliverables clear.
- Brief the agencies regarding deliverables and the metrics that will be used as the basis for decision making (the approach and working method, collaboration, listening and response, production values, etc.).
- Simulate a real-world working relationship to experience what it’s like working with the agency and examine how they work.

Develop a Spec Assignment Brief

The spec assignment brief is the basis for final stage agency-client interaction. A well-constructed spec assignment brief provides a clear outline regarding what the client is trying to accomplish and the fundamental challenges, opportunities, and expectations that exist. A good brief is brief—it is a summation of critical assumptions and necessary guidelines and knowledge that provide significant information and insight about the client’s marketing activities. A spec assignment brief should be communicated in writing and then discussed between the parties in face-to-face meetings, allowing agencies to ask questions and explore areas with you. The briefing is as important as the brief—please allocate enough time for it.

Speculative assignments fall into two categories—strategic ability as well as strategic and creative ability.

Good strategic assignments might include the following:

- A “think piece” or white paper
- A strategic point of view or analysis
- A recommendation on how to invest the budget

If the process includes a spec creative assignment, the marketer should:

- Be clear and specific about the degree of finish and number of executions or approaches; typically it’s rough work only or the degree of finish used in normal, ongoing client presentations. Do you want choice and a recommendation?
- Provide enough time for development and interaction (typically four weeks).
- Plan to be available for a “tissue” work session between the briefing and the final. Consider having multiple work sessions and provide the participating agencies with pointed feedback following each work session.
- Ensure the agencies have a single point of contact to address their questions. Ideally, the point of contact is the senior-most decision maker on the brand or project.
- Communicate the methodology for posing additional questions, requests for research, etc.
- Brief the agency in advance if new decision makers, who are not part of the review process, will be included in the final phase or the final recommendation.
- Allow adequate time (e.g., three hours) for agencies to present their work.
- Be human; schedule final presentations in a reasonable way to allow for you to digest and discuss presentations.

Spec Requirements: Information and Access

When spec work is part of the review process, give finalists enough information, access to you, and time to do the work effectively and efficiently. Consider these guidelines:

- Be prepared to share confidential information, research, etc. All parties involved (client, the agencies, and consultants) should enter into a confidentiality agreement.
- Spec assignment briefings are most effective when they are conducted in separate face-to-face meetings with each agency. This procedural approach allows the client team to interact with the agency team. If you must brief all agencies together, allow individual sessions for questions and answers. An agency is not going to ask its most-insightful questions with other agencies present.
- Be available to answer questions that arise during the work process within 24 hours.
- Most agencies also like to meet at least once with key decision makers to ensure their work is on the right track.
- Treat all agencies equally and maintain a level playing field. Do not punish an agency for asking a question that the others should have or for using its time differently.
- Determine and communicate in advance how speculative plans or creative work will be evaluated and tested.
- Give the agencies enough time to develop and present (for most agencies four weeks is acceptable), but do not overextend the time period.
- Have all the final presentations around the same time—a day or two apart maximum. Don’t allow scheduling difficulties to create a situation where one or more agencies get more time than the others.
- Clearly communicate policies or limitations your company has with respect to leave-behind materials or accepting agency promotional materials. Tell the agencies the number of copies required.
- Ensure that your process allows the agencies to demonstrate what differentiates them beyond their final work.
- Take good notes. The agencies that don’t win will want to know what they could have done differently when the process is over.

Final Meetings—Optimizing Spec Presentations

After this major time investment, do everything possible to allow the agencies to shine, and consider the following:

- In the spirit of being a good partner, be considerate of the agencies' lives outside the office. Try not to schedule the final presentations on a day following a holiday, as the agencies would likely have to work during the holiday to prepare.
- Select the final venue early. Think about possibly using two rooms to allow for more time for agency setup and tear down or advise the agencies that the setup will be limited to a specific amount of time (e.g., 60 minutes).
- Send the agencies floor plans of the venue in advance, and schedule time for them to inspect the venue.
- Provide the agencies with a list of available audio-visual equipment; make it clear that they have the option of using additional equipment at their own expense. (This will help them decide if they wish to bring in additional resources.)
- Provide a logistics coordinator who can handle all small requests from agencies, e.g., for information about shipping, setup, and return of materials.

Agree on Usage Rights

If the marketer is interested in obtaining an assignment or license of an agency-developed work product, then the agency and marketer should agree on supplemental, fair-value compensation for usage rights. Payment for usage rights should not be confused with token stipends that are paid merely to partially offset an agency's cost of participating in a review.

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ANA and 4A's would like to acknowledge our members whose collective experience and wisdom contributed to the development of these guidelines.

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